



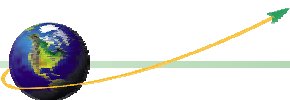
# Travel & Tourism in New Jersey

*A Report on the 2000 Travel Year*

*-- Draft --*

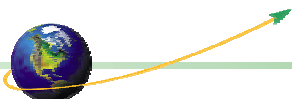
*May, 2001*

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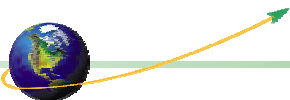
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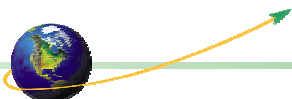
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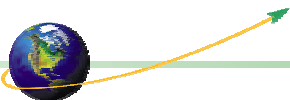
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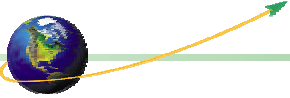
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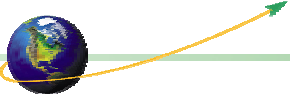
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# Background



- ◉ This report describes research conducted by Longwoods International on behalf of the New Jersey Office of Travel and Tourism for the 2000 travel year.
- ◉ Conducted annually since 1991, the New Jersey Research Program:
  - ◉ *provides monitoring and tracking data for the state's tourism industry*
  - ◉ *establishes the economic impacts of tourism in New Jersey*
  - ◉ *provides input into the state's tourism marketing strategy*
  - ◉ *tracks awareness and impacts of New Jersey's tourism advertising*
  - ◉ *provides accountability in terms of the trips generated by advertising and the return the state receives on its investment in tourism promotion.*

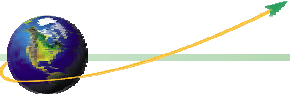
# The Research



- ◉ The research program begins with Longwoods' **TRAVEL USA®** Monitor, which surveys the travel patterns of 200,000 U.S. households annually.
- ◉ In addition to **TRAVEL USA®**, the research program for the 2000 travel year included:
  - ◉ *a survey of the New Jersey day trip market*
  - ◉ *a survey of overnight visitors to New Jersey*
  - ◉ *surveys of several key international markets to identify visitor numbers (reported under separate cover)*
  - ◉ *an inventory of the New Jersey accommodations industry and*
  - ◉ *an advertising benchmark study.*
- ◉ An overview of the research method for the various studies conducted is presented in Appendix I.

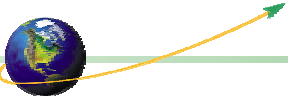


# The Research



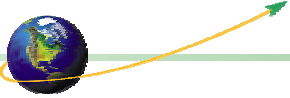
- ◉ The Longwoods segmentation model identifies 12 types of pleasure trips and 3 types of business trips, allowing the program to focus on trips of specific interest to New Jersey, such as: casino trips, beach trips, touring trips, and special event trips.
- ◉ To provide annual documentation of the impacts of tourism on New Jersey's economy, Longwoods has retained Dr. James M. Rovelstad of Rovelstad & Associates.
- ◉ Visitor expenditure estimates serve as inputs into an economic input/output model for the state.

# This Report



- ⊙ This report summarizes the main findings of the research program.
- ⊙ It is organized into four sections:
  - ⊙ *Key New Jersey Travel and Tourism Facts: a compendium of facts about New Jersey's Travel and Tourism industry, organized for quick and easy reference*
  - ⊙ *New Jersey's Pleasure Travel Market: demographic profile of the New Jersey overnight pleasure trip vs. that of the U.S. norm*
  - ⊙ *New Jersey's Image and Product Delivery, and*
  - ⊙ *Impact of the state's advertising.*

# This Report



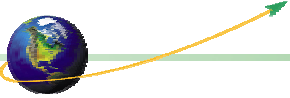
- ◉ In order to make results for the 2000 travel year available as quickly as possible, some 4th quarter data on economic impact are estimated; our 2001 report will update any significant changes in the results.



# Key New Jersey Travel and Tourism Facts

# Size of New Jersey's Travel Market\*

## 2000

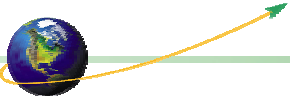


|                                | Estimated Trips<br>(Millions) |
|--------------------------------|-------------------------------|
| <b>DAY TRIPS</b>               |                               |
| Business                       | 7.9                           |
| Pleasure                       | <u>117.2</u>                  |
| Total                          | 125.1                         |
| <b>OVERNIGHT TRIPS</b>         |                               |
| Business                       | 6.6                           |
| Pleasure                       | <u>37.4</u>                   |
| Total                          | 44.0                          |
| <b>DAY AND OVERNIGHT TRIPS</b> |                               |
| Business                       | 14.5                          |
| Pleasure                       | <u>154.6</u>                  |
| Total                          | 169.1                         |

\* Estimated person trips by adults 18+ who are residents of the U.S. excluding Alaska and Hawaii. A "trip" is defined as any trip outside your own community that is not part of your normal routine.

Source: Longwoods International

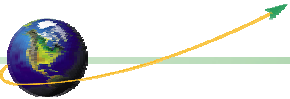
# New Jersey's Travel Market By Region 2000



| REGION                     | <u>Estimated<br/>Overnight Trips</u><br>(Millions) | <u>Estimated<br/>Day Trips</u><br>(Millions) | <u>Estimated<br/>Total Trips</u><br>(Millions) |
|----------------------------|--|--|--|
| Skylands                   | 3.8  | 12.0   | 15.8   |
| Atlantic County            | 17.0   | 36.1   | 53.1   |
| Southern Shore             | 5.3  | 11.2   | 20.7   |
| Delaware River             | 3.8  | 15.4   | 19.2   |
| Shore Region               | 5.8  | 26.6   | 32.4   |
| Gateway Region             | 8.2  | 23.7   | 31.9   |
| <b>TOTAL SHORE REGIONS</b> | 28.1   | 73.9   | 102.0  |
| <b>TOTAL</b>               | 43.9   | 125.1  | 169.0  |

Source: Longwoods International  
Regional distribution of overnight trips based on 2000 data

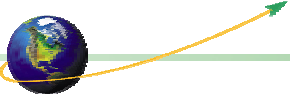
# 2000 Travel and Tourism Expenditures



**Total 2000 Expenditures = \$30.1 Billion**

| <b><u>TOTAL EXPENDITURES BY:</u></b> | <b><u>\$ Billions</u></b> | <b><u>%</u></b> |
|--------------------------------------|---------------------------|-----------------|
| <b>TYPE OF TRIP</b>                  |                           |                 |
| Day Trips                            | 8.7                       | 29              |
| Overnight Trips                      | 19.6                      | 65              |
| Pass Through                         | 1.8                       | 6               |
| <b>SECTOR</b>                        |                           |                 |
| Restaurant                           | 8.9                       | 29              |
| Retail                               | 6.5                       | 22              |
| Gaming                               | 4.1                       | 14              |
| Automobile                           | 3.9                       | 13              |
| Lodging                              | 4.0                       | 13              |
| Recreation                           | 2.5                       | 8               |
| Local Transportation                 | 0.3                       | 1               |
| <b>PLACE OF RESIDENCE</b>            |                           |                 |
| New Jersey                           | 6.9                       | 23              |
| Other States                         | 23.2                      | 77              |

# 2000 Travel and Tourism Per Person Expenditures



**Total 2000 Expenditures = \$30.1 Billion**

| <u>PER PERSON* EXPENDITURES</u> | <u>Entire Trip</u> | <u>Per Day**</u> |
|---------------------------------|--------------------|------------------|
| Day Trips                       | \$70               | \$70             |
| Overnight Trips                 | \$445              | \$134            |
| Day and Overnight Trips         | \$178              | \$111            |

\* Per adult member of the travel party

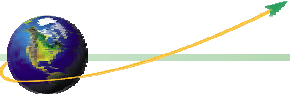
\*\* Average length of stay was 3.3 nights on overnight trips

4th quarter data estimated

Source: Rovelstad & Associates, Longwoods International



# 2000 Economic Impact of Travel and Tourism



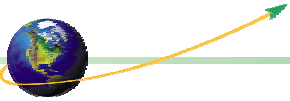
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|---|---------------|
| <b>TOTAL EXPENDITURES (\$ BILLIONS)</b> | <b>30.1</b>   |
| <b>EMPLOYMENT (Thousands)</b>           |               |
| Direct                                  | 487           |
| Indirect                                | <u>345</u>    |
| <b>Total*</b>                           | <b>832</b>    |
| <b>PAYROLL (\$ Billions)</b>            |               |
| Direct                                  | 8,527         |
| Indirect                                | <u>8,885</u>  |
| <b>Total*</b>                           | <b>17,413</b> |
| <b>STATE TAXES (\$ Billions)</b>        |               |
| Direct                                  | 2,136         |
| Indirect                                | <u>1,639</u>  |
| <b>Total*</b>                           | <b>3,775</b>  |
| <b>LOCAL TAXES (\$ Billions)</b>        |               |
| Direct                                  | 306           |
| Indirect                                | <u>1,537</u>  |
| <b>Total*</b>                           | <b>1,843</b>  |

\* Columns may not sum due to rounding

4th quarter data estimated

Source: Rovelstad & Associates, Longwoods International

# 2000 Economic Impact By Region



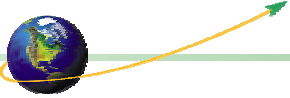
|                       | <u>Delaware</u> | <u>Gateway</u> | <u>Greater<br/>Atlantic</u> | <u>Shore</u> | <u>Southern<br/>Shore</u> | <u>Skylands</u> |
|-----------------------|-----------------|----------------|-----------------------------|--------------|---------------------------|-----------------|
| <b>EXPENDITURES**</b> |                 |                |                             |              |                           |                 |
| <b>\$ Billions</b>    | 3.1             | 8.1            | 9.0                         | 3.7          | 3.2                       | 2.9             |
| % of State Total      | 10              | 27             | 30                          | 12           | 11                        | 10              |
| <b>EMPLOYMENT*</b>    |                 |                |                             |              |                           |                 |
| <b>Thousands</b>      | 103             | 245            | 180                         | 115          | 111                       | 78              |
| % of State Total      | 12              | 29             | 22                          | 14           | 13                        | 9               |
| <b>PAYROLL*</b>       |                 |                |                             |              |                           |                 |
| <b>\$ Billions</b>    | 2.0             | 5.4            | 4.8                         | 2.0          | 1.6                       | 1.6             |
| % of State Total      | 11              | 31             | 27                          | 11           | 9                         | 10              |
| <b>STATE TAXES*</b>   |                 |                |                             |              |                           |                 |
| <b>\$ Millions</b>    | 388             | 1,043          | 1,182                       | 443          | 386                       | 333             |
| % of State Total      | 10              | 28             | 31                          | 12           | 10                        | 9               |
| <b>LOCAL TAXES*</b>   |                 |                |                             |              |                           |                 |
| <b>\$ Millions</b>    | 208             | 536            | 552                         | 210          | 176                       | 162             |
| % of State Total      | 11              | 29             | 30                          | 11           | 10                        | 9               |

\* Includes direct and indirect impacts

\*\* 4th quarter data estimated

Source: Rovelstad & Associates, Longwoods International

# Economic Impact of Travel and Tourism – 1994 to 2000



|                                  | <u>1994</u> | <u>1995</u> | <u>1996</u> | <u>1997</u> | <u>1998*</u> | <u>1999</u> | <u>2000**</u> |
|----------------------------------|-------------|-------------|-------------|-------------|--------------|-------------|---------------|
| Expenditures (\$ Billions)       | 22.8        | 23.4        | 24.0        | 25.6        | 26.0         | 28.2        | 30.1          |
| Employment (Thousands)           |             |             |             |             |              |             |               |
| Direct                           | 384         | 390         | 403         | 400         | 408          | 473         | 487           |
| Indirect                         | <u>184</u>  | <u>185</u>  | <u>181</u>  | <u>223</u>  | <u>228</u>   | <u>314</u>  | <u>345</u>    |
| <b>Total</b>                     | <b>569</b>  | <b>576</b>  | <b>584</b>  | <b>623</b>  | <b>635</b>   | <b>787</b>  | <b>832</b>    |
| Payroll (\$ Billions)            |             |             |             |             |              |             |               |
| Direct                           | 6.1         | 6.2         | 6.6         | 6.7         | 6.8          | 8.1         | 8.5           |
| Indirect                         | <u>4.2</u>  | <u>4.3</u>  | <u>4.3</u>  | <u>6.2</u>  | <u>6.4</u>   | <u>8.5</u>  | <u>8.9</u>    |
| <b>Total</b>                     | <b>10.3</b> | <b>10.5</b> | <b>11.0</b> | <b>12.9</b> | <b>13.2</b>  | <b>16.6</b> | <b>17.4</b>   |
| State Taxes (\$ Billions)        | 2.5         | 2.6         | 2.9         | 3.2         | 3.2          | 3.6         | 3.8           |
| Local Taxes (\$ Billions)        | <u>1.1</u>  | <u>1.2</u>  | <u>1.2</u>  | <u>1.5</u>  | <u>1.5</u>   | <u>1.8</u>  | <u>1.8</u>    |
| <b>Total Taxes (\$ Billions)</b> | <b>3.6</b>  | <b>3.8</b>  | <b>4.1</b>  | <b>4.6</b>  | <b>4.7</b>   | <b>5.4</b>  | <b>5.6</b>    |

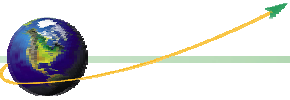
\* Since the economic input/output model was not run in 1998, impacts other than expenditures are estimated

\*\* 4th quarter data estimated

Source: Rovelstad & Associates, Longwoods International

# Travel and Tourism Expenditures

## 1999 vs. 2000



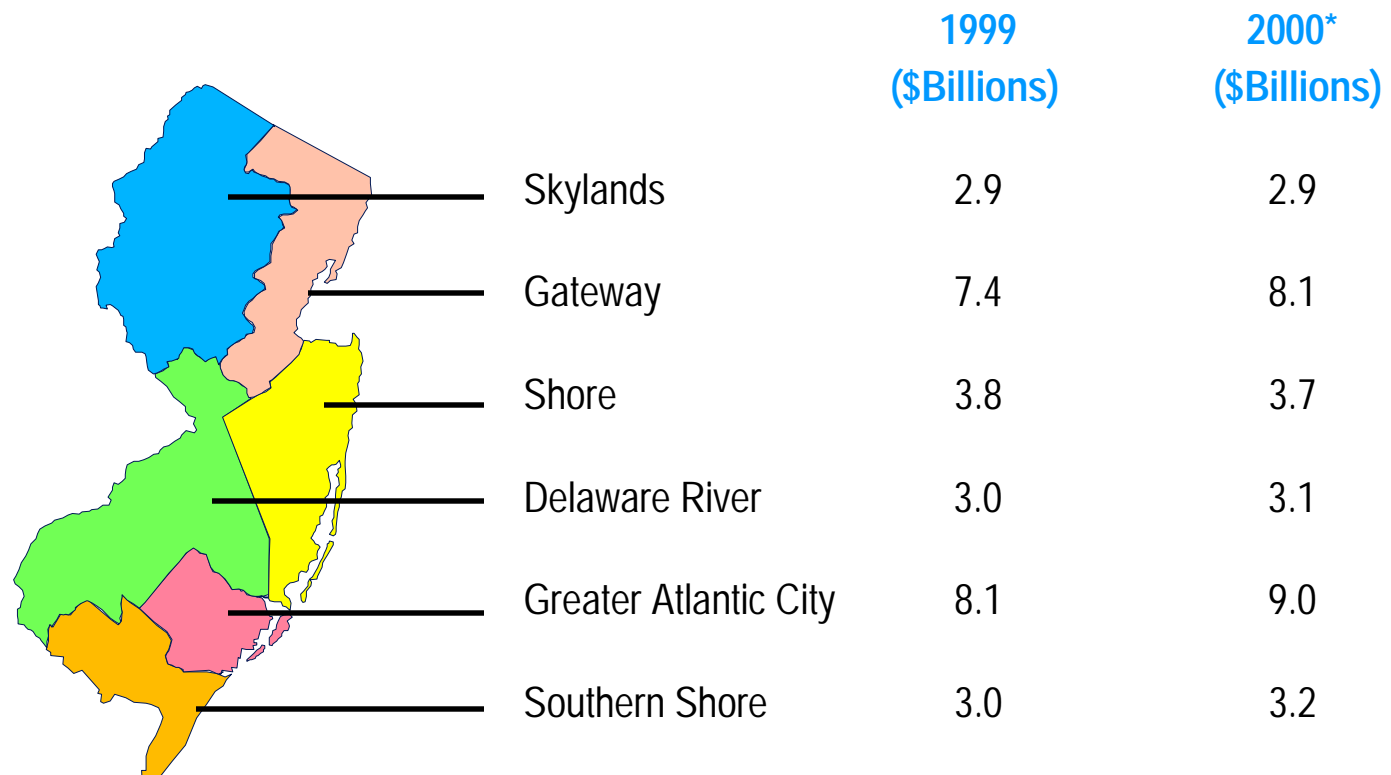
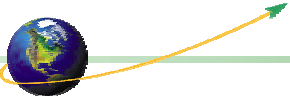
|                                      | <u>1999</u> | <u>2000*</u> | <u>% Change</u> |
|--------------------------------------|-------------|--------------|-----------------|
| <b>TOTAL</b>                         | <b>28.2</b> | <b>30.1</b>  | <b>+7</b>       |
| <b>BY TYPE OF TRIP (\$ Billions)</b> |             |              |                 |
| Day Trip                             | 8.28        | 8.75         | +6              |
| Overnight Trip                       | 18.23       | 19.53        | +7              |
| Pass Through                         | 1.70        | 1.82         | +7              |
| <b>BY SECTOR (\$ Billions)</b>       |             |              |                 |
| Restaurant                           | 8.31        | 8.86         | +7              |
| Retail                               | 6.10        | 6.47         | +6              |
| Gaming                               | 3.76        | 4.15         | +10             |
| Automobile                           | 3.72        | 3.95         | +6              |
| Lodging                              | 3.76        | 4.03         | +7              |
| Recreation                           | 2.33        | 2.45         | +5              |
| Local Transportation                 | 0.26        | 0.27         | +7              |
| <b>PER TRAVELER (\$'s)</b>           |             |              |                 |
| Day Trips                            | \$67        | 70           | +4              |
| Overnight Trips                      | \$416       | 445          | +7              |

\* 4th quarter data estimated

Source: Rovelstad & Associates, Longwoods International

# Regional Travel Expenditures

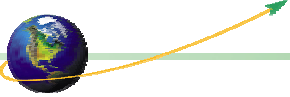
## 1999 vs. 2000



\* 4th quarter 2000 estimated

Source: Rovelstad & Associates, Longwoods International

# 2000 Travel and Tourism Expenditures — By County



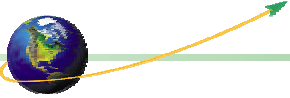
|            | <u>Total</u>  | <u>Gaming</u> | <u>Restaurant</u> | <u>Retail</u> | <u>Lodging</u> | <u>Automobile</u> | <u>Recreation</u> | <u>Local<br/>Transportation</u> |
|------------|---------------|---------------|-------------------|---------------|----------------|-------------------|-------------------|---------------------------------|
|            | (\$ Billions) | (\$ Billions) | (\$ Millions)     | (\$ Millions) | (\$ Millions)  | (\$ Millions)     | (\$ Millions)     | (\$ Millions)                   |
| Atlantic   | 9.00          | 4.15          | 1,585             | 1,011         | 965            | 772               | 465               | 60                              |
| Bergen     | 2.02          |               | 736               | 523           | 260            | 314               | 171               | 23                              |
| Burlington | 0.93          |               | 331               | 262           | 78             | 147               | 100               | 9                               |
| Camden     | 0.86          |               | 319               | 261           | 55             | 134               | 85                | 8                               |
| Cape May   | 3.05          |               | 863               | 558           | 977            | 384               | 247               | 27                              |
| Cumberland | 0.16          |               | 66                | 51            | 9              | 25                | 13                | 2                               |
| Essex      | 1.75          |               | 640               | 457           | 219            | 271               | 147               | 20                              |
| Gloucester | 0.35          |               | 132               | 105           | 19             | 53                | 33                | 3                               |
| Hudson     | 1.30          |               | 478               | 339           | 159            | 201               | 109               | 15                              |
| Hunterdon  | 0.19          |               | 73                | 54            | 18             | 30                | 17                | 2                               |
| Mercer     | 0.87          |               | 303               | 249           | 79             | 140               | 97                | 9                               |
| Middlesex  | 1.58          |               | 575               | 408           | 205            | 245               | 134               | 18                              |
| Monmouth   | 1.79          |               | 586               | 527           | 158            | 284               | 226               | 15                              |
| Morris     | 1.50          |               | 519               | 371           | 216            | 237               | 142               | 17                              |
| Ocean      | 1.94          |               | 588               | 511           | 329            | 274               | 222               | 14                              |
| Passaic    | 0.55          |               | 219               | 169           | 32             | 82                | 42                | 6                               |
| Salem      | 0.12          |               | 45                | 35            | 8              | 19                | 12                | 1                               |
| Somerset   | 0.80          |               | 279               | 201           | 111            | 126               | 75                | 9                               |
| Sussex     | 0.27          |               | 104               | 72            | 28             | 42                | 25                | 3                               |
| Union      | 0.93          |               | 347               | 254           | 98             | 142               | 76                | 10                              |
| Warren     | 0.16          |               | 61                | 45            | 12             | 24                | 14                | 2                               |

Note: Numbers may not sum to total due to rounding

4th quarter data estimated

Source: Rovelstad & Associates, Longwoods International

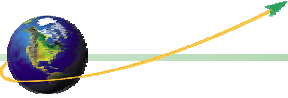
# 2000 Travel and Tourism Impacts By County



|            | <u>Jobs</u><br>(Thousands) | <u>Payroll</u><br>(\$ Millions) | <u>State Taxes</u><br>(\$ Millions) | <u>Local Taxes</u><br>(\$ Millions) |
|------------|----------------------------|---------------------------------|-------------------------------------|-------------------------------------|
| Atlantic   | 180.0                      | 4770.4                          | 1182.8                              | 551.5                               |
| Bergen     | 56.7                       | 1310.8                          | 262.2                               | 148.3                               |
| Burlington | 30.7                       | 595.0                           | 114.4                               | 62.0                                |
| Camden     | 29.4                       | 555.0                           | 110.0                               | 61.5                                |
| Cape May   | 105.5                      | 1550.9                          | 365.8                               | 170.1                               |
| Cumberland | 5.9                        | 89.0                            | 20.4                                | 6.0                                 |
| Essex      | 51.3                       | 1216.8                          | 224.4                               | 111.5                               |
| Gloucester | 12.4                       | 194.2                           | 43.6                                | 19.6                                |
| Hudson     | 39.3                       | 861.9                           | 162.7                               | 64.0                                |
| Hunterdon  | 4.7                        | 93.0                            | 20.8                                | 8.0                                 |
| Mercer     | 26.4                       | 557.0                           | 106.2                               | 59.5                                |
| Middlesex  | 51.1                       | 1103.3                          | 202.7                               | 113.9                               |
| Monmouth   | 51.7                       | 1004.7                          | 210.9                               | 105.9                               |
| Morris     | 40.7                       | 922.1                           | 177.8                               | 92.9                                |
| Ocean      | 63.3                       | 959.9                           | 231.6                               | 103.7                               |
| Passaic    | 17.8                       | 346.8                           | 70.5                                | 35.6                                |
| Salem      | 3.6                        | 55.1                            | 13.7                                | 5.1                                 |
| Somerset   | 19.8                       | 430.3                           | 87.1                                | 40.8                                |
| Sussex     | 8.2                        | 123.7                           | 29.3                                | 12.3                                |
| Union      | 28.5                       | 594.0                           | 120.7                               | 63.1                                |
| Warren     | 4.8                        | 79.3                            | 18.2                                | 7.6                                 |

Source: Rovelstad & Associates, Longwoods International

# 2000 Accommodations Inventory And Occupancy – By County



|              | <u>Hotels/Motels/Resorts</u> |                          | <u>Campgrounds**</u> |                           |
|--------------|------------------------------|--------------------------|----------------------|---------------------------|
|              | <u># of Rooms</u>            | <u>Occupancy*</u><br>(%) | <u># of Sites</u>    | <u>Occupancy %</u><br>(%) |
| Atlantic     | 19,232                       | 85.72                    | 1,769                | 46.4****                  |
| Bergen       | 6,800                        | 80.10                    | --                   | --                        |
| Burlington   | 3,869                        | 66.13                    | 980                  | 45.5***                   |
| Camden       | 2,418                        | 56.94                    | --                   | --                        |
| Cape May     | 19,737                       | 69.23                    | 5,972                | 44.5                      |
| Cumberland   | 576                          | 67.87***                 | 14                   | 44.5***                   |
| Essex        | 4,225                        | 82.34                    | --                   | --                        |
| Gloucester   | 863                          | 65.04***                 | 398                  | 45.5***                   |
| Hudson       | 3,191                        | 80.06                    | 330                  | 46.4****                  |
| Hunterdon    | 732                          | 58.42                    | 427                  | 37.9***                   |
| Mercer       | 2,376                        | 72.33                    | 20                   | 45.5***                   |
| Middlesex    | 5,710                        | 73.05                    | 53                   | 46.4****                  |
| Monmouth     | 4,574                        | 64.46                    | 184                  | 46.4****                  |
| Morris       | 5,340                        | 77.53                    | 99                   | 37.9***                   |
| Ocean        | 4,393                        | 65.38                    | 1,356                | 46.4****                  |
| Passaic      | 908                          | 78.37***                 | 50                   | 46.4****                  |
| Salem        | 383                          | 65.04***                 | 399                  | 45.5***                   |
| Somerset     | 2,666                        | 80.82                    | --                   | --                        |
| Sussex       | 851                          | 75.17***                 | 1,115                | 37.9***                   |
| Union        | 2,831                        | 71.97                    | --                   | --                        |
| Warren       | 423                          | 75.17***                 | 343                  | 37.9                      |
| <b>State</b> | <b>92,098</b>                | <b>76.30</b>             | <b>13,508</b>        | <b>46.4****</b>           |

\* Average weighted by rooms and months open

\*\* Includes private and public transient campsites

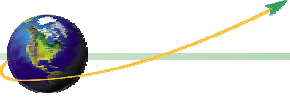
\*\*\* Region average

\*\*\*\* State average

Source: Rovelstad & Associates



# Expenditures and Employment – County Ranks

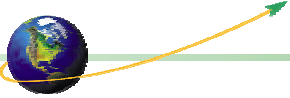


| <u>TOTAL EXPENDITURES</u> |               |                    |
|---------------------------|---------------|--------------------|
|                           | <u>County</u> | <u>\$ Billions</u> |
| 1)                        | Atlantic      | 9.00               |
| 2)                        | Cape May      | 3.05               |
| 3)                        | Bergen        | 2.02               |
| 4)                        | Ocean         | 1.94               |
| 5)                        | Monmouth      | 1.79               |
| 6)                        | Essex         | 1.75               |
| 7)                        | Middlesex     | 1.58               |
| 8)                        | Morris        | 1.50               |
| 9)                        | Hudson        | 1.30               |
| 10)                       | Burlington    | 0.93               |
| 11)                       | Union         | 0.93               |
| 12)                       | Mercer        | 0.87               |
| 13)                       | Camden        | 0.86               |
| 14)                       | Somerset      | 0.80               |
| 15)                       | Passaic       | 0.55               |
| 16)                       | Gloucester    | 0.35               |
| 17)                       | Sussex        | 0.27               |
| 18)                       | Hunterdon     | 0.19               |
| 19)                       | Cumberland    | 0.16               |
| 20)                       | Warren        | 0.16               |
| 21)                       | Salem         | 0.12               |

| <u>TOTAL EMPLOYMENT</u> |               |                            |
|-------------------------|---------------|----------------------------|
|                         | <u>County</u> | <u>Jobs</u><br>(Thousands) |
| 1)                      | Atlantic      | 180                        |
| 2)                      | Cape May      | 106                        |
| 3)                      | Ocean         | 63                         |
| 4)                      | Bergen        | 57                         |
| 5)                      | Monmouth      | 52                         |
| 6)                      | Middlesex     | 51                         |
| 7)                      | Essex         | 51                         |
| 8)                      | Morris        | 41                         |
| 9)                      | Hudson        | 39                         |
| 10)                     | Burlington    | 31                         |
| 11)                     | Camden        | 29                         |
| 12)                     | Union         | 28                         |
| 13)                     | Mercer        | 26                         |
| 14)                     | Somerset      | 20                         |
| 15)                     | Passaic       | 18                         |
| 16)                     | Gloucester    | 12                         |
| 17)                     | Sussex        | 8                          |
| 18)                     | Cumberland    | 6                          |
| 19)                     | Warren        | 5                          |
| 20)                     | Hunterdon     | 5                          |
| 21)                     | Salem         | 4                          |

Source: Rovelstad & Associates, Longwoods International

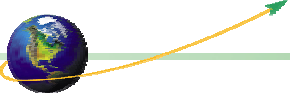
# Reasons for Taking a New Jersey Trip – 2000



|                         | <u>OVERNIGHT TRIPS</u>                 |                | <u>DAY TRIPS</u>                       |                |
|-------------------------|--|----------------|--|----------------|
|                         | <u>Estimated<br/>Millions of Trips</u> | <u>Percent</u> | <u>Estimated<br/>Millions of Trips</u> | <u>Percent</u> |
| <b>PLEASURE TRIPS</b>   | <b>37.4</b>                            | <b>85</b>      | <b>117.5</b>                           | <b>94</b>      |
| Visit Friends/Relatives | 15.7                                   | 36             | 39.6                                   | 32             |
| Casino                  | 11.2                                   | 25             | 25.9                                   | 21             |
| Beach                   | 4.1                                    | 9              | 16.4                                   | 13             |
| Special Event           | 1.8                                    | 4              | 3.1                                    | 2              |
| Touring                 | 1.4                                    | 3              | 6.0                                    | 5              |
| Business/Pleasure       | 1.0                                    | 2              | --                                     | --             |
| City                    | 0.7                                    | 2              | 1.9                                    | 2              |
| Outdoor                 | 0.5                                    | 1              | 5.9                                    | 5              |
| Theme Park              | 0.4                                    | 1              | 3.1                                    | 2              |
| Country Resort          | 0.3                                    | 1              | 1.6                                    | 1              |
| Cruise                  | 0.2                                    | <1             | 0.3                                    | <1             |
| Ski                     | 0.1                                    | <1             | 0.1                                    | <1             |
| Shopping                | --                                     | --             | 14.0                                   | 11             |
| <b>BUSINESS TRIPS</b>   | <b>6.6</b>                             | <b>15</b>      | <b>7.9</b>                             | <b>6</b>       |

Source: Longwoods International

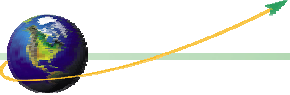
# Reasons for Taking a New Jersey Overnight Trip— 1994 to 2000



|                         | <u>1994</u><br>(Millions) | <u>1995</u><br>(Millions) | <u>1996</u><br>(Millions) | <u>1997</u><br>(Millions) | <u>1998</u><br>(Millions) | <u>1999</u><br>(Millions) | <u>2000</u><br>(Millions) |
|-------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|
| <b>PLEASURE TRIPS</b>   | <b>30.5</b>               | <b>30.8</b>               | <b>30.8</b>               | <b>34.6</b>               | <b>34.0</b>               | <b>37.8</b>               | <b>37.4</b>               |
| Visit Friends/Relatives | 13.0                      | 13.6                      | 13.1                      | 15.3                      | 14.3                      | 15.1                      | 15.7                      |
| Casino                  | 7.4                       | 7.4                       | 7.7                       | 9.3                       | 9.6                       | 12.1                      | 11.2                      |
| Beach                   | 4.2                       | 3.9                       | 4.0                       | 4.0                       | 4.5                       | 3.7                       | 4.1                       |
| Special Event           | 1.7                       | 1.4                       | 1.5                       | 1.7                       | 1.3                       | 1.9                       | 1.8                       |
| Touring                 | 1.5                       | 1.3                       | 1.2                       | 1.4                       | 1.3                       | 1.7                       | 1.4                       |
| Business/Pleasure       | 0.8                       | 1.1                       | 1.2                       | 1.0                       | 1.1                       | 1.0                       | 1.0                       |
| Outdoor                 | 0.8                       | 1.1                       | 0.8                       | 0.8                       | 0.5                       | . 6                       | 0.5                       |
| City                    | 0.6                       | 0.4                       | 0.3                       | 0.5                       | 0.5                       | . 9                       | 0.7                       |
| Theme Park              | 0.3                       | 0.3                       | 0.3                       | 0.3                       | 0.5                       | . 3                       | 0.4                       |
| Country Resort          | 0.2                       | 0.2                       | 0.4                       | 0.1                       | 0.3                       | . 2                       | 0.3                       |
| Ski                     | 0.1                       | 0.1                       | 0.1                       | <0.1                      | 0.1                       | . 1                       | 0.1                       |
| Cruise                  | 0.1                       | <0.1                      | 0.1                       | 0.1                       | <0.1                      | . 1                       | 0.2                       |
| <b>BUSINESS TRIPS</b>   | <b>5.3</b>                | <b>5.3</b>                | <b>6.5</b>                | <b>6.2</b>                | <b>6.0</b>                | <b>6.0</b>                | <b>6.6</b>                |

Source: Longwoods International

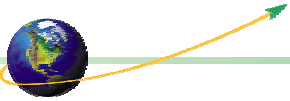
# Reasons for Taking a New Jersey Day Trip – 1994 to 2000



|                         | <u>1994</u><br>(Millions) | <u>1995</u><br>(Millions) | <u>1996</u><br>(Millions) | <u>1997</u><br>(Millions) | <u>1998</u><br>(Millions) | <u>1999</u><br>(Millions) | <u>2000</u><br>(Millions) |
|-------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|
| <b>PLEASURE TRIPS</b>   | <b>129.0</b>              | <b>116.7</b>              | <b>114.6</b>              | <b>107.5</b>              | <b>110.7</b>              | <b>114.6</b>              | <b>117.5</b>              |
| Visit Friends/Relatives | 55.9                      | 50.4                      | 40.9                      | 35.8                      | 39.7                      | 36.9                      | 39.6                      |
| Casino                  | 28.4                      | 24.8                      | 31.1                      | 25.3                      | 26.6                      | 22.3                      | 25.9                      |
| Beach                   | 13.3                      | 14.9                      | 12.4                      | 14.4                      | 13.9                      | 13.5                      | 16.4                      |
| Special Event           | 11.4                      | 5.0                       | 5.9                       | 6.6                       | 5.7                       | 4.0                       | 2.6                       |
| Touring                 | 2.3                       | 5.1                       | 5.0                       | 7.8                       | 7.7                       | 7.0                       | 6.0                       |
| Outdoor                 | 6.2                       | 5.3                       | 13.1                      | 6.4                       | 9.4                       | 7.8                       | 5.9                       |
| City                    | 5.6                       | 4.9                       | 1.5                       | 5.5                       | 2.8                       | 3.2                       | 1.9                       |
| Theme Park              | 3.4                       | 3.0                       | 2.8                       | 3.8                       | 3.1                       | 3.7                       | 3.1                       |
| Country Resort          | 0.6                       | 2.4                       | 1.0                       | 0.5                       | 0.8                       | 1.7                       | 1.6                       |
| Ski                     | 0.6                       | 0.3                       | 0.9                       | 1.2                       | 0.7                       | 0.5                       | 0.1                       |
| Cruise                  | 1.1                       | 0.6                       | < 0.1                     | 0.1                       | 0.2                       | 0.3                       | 0.3                       |
| Shopping                | N/A                       | N/A                       | N/A                       | N/A                       | N/A                       | 13.7                      | 14.0                      |
| <b>BUSINESS TRIPS</b>   | <b>7.8</b>                | <b>10.4</b>               | <b>19.5</b>               | <b>12.6</b>               | <b>12.9</b>               | <b>8.5</b>                | <b>7.9</b>                |

Source: Longwoods International

# National Travel and Tourism Trends



|  | <u>1994</u> | <u>1995</u> | <u>1996</u> | <u>1997</u> | <u>1998</u> | <u>1999</u> | <u>2000</u> |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Overnight Trips* (Billions)                    | 1.185       | 1.177       | 1.235       | 1.375       | 1.448       | 1.478       | 1.493       |
| Overnight Business Trips* (Billions)           | 0.253       | 0.236       | 0.260       | 0.286       | 0.315       | 0.324       | 0.324       |
| Overnight Pleasure Trips* (Billions)           | 0.932       | 0.940       | 0.975       | 1.089       | 1.133       | 1.153       | 1.169       |
| Estimated Overnight Casino Trips*** (Millions) | 37          | 40          | 44          | 52          | 54          | 66          | 70          |
| Average Daily Per Person Expenditures**        | \$51        | \$53        | \$58        | \$58        | \$65        | \$76        | \$76        |
| Average Nights Away                            | 5.1         | 5.3         | 5.1         | 4.8         | 4.7         | 4.9         | 5.2         |
| Pleasure Trips                                 | 5.0         | 5.3         | 5.4         | 4.9         | 4.8         | 5.0         | 5.6         |
| Business Trips                                 | 5.4         | 5.2         | 3.9         | 4.3         | 4.3         | 4.2         | 3.7         |
| Use of Pre-Paid Packages                       | 12%         | 10%         | 10%         | 6%          | 6%          | 10%         | 9%          |
| Use of Travel Agents                           |             |             |             |             |             |             |             |
| For Trip Planning                              | 17%         | 16%         | 15%         | 17%         | 16%         | 15%         | 13%         |
| To Book All/Part of Trip                       | 18%         | 18%         | 17%         | 18%         | 16%         | 16%         | 15%         |
| Use of the Internet                            |             |             |             |             |             |             |             |
| For Trip Planning                              | N/A         | N/A         | 2%          | 6%          | 11%         | 14%         | 22%         |
| To Book All/Part of Trip                       | N/A         | N/A         | N/A         | N/A         | N/A         | 10%         | 16%         |
| Participation in Types of Tourism              |             |             |             |             |             |             |             |
| Historic                                       | N/A         | N/A         | N/A         | 13%         | 15%         | 18%         | 16%         |
| Cultural                                       | N/A         | N/A         | N/A         | 11%         | 9%          | 11%         | 9%          |
| Eco-tourism                                    | N/A         | N/A         | N/A         | 8%          | 6%          | 7%          | 8%          |

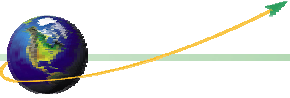
\* Trips by adults 18+

\*\* Per adult members of party, does not include travelers on a pre-paid package

\*\*\* Trips for which casino gaming was the main purpose

Source: Longwoods International

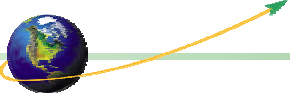
# New Jersey's Competitive Position in the U.S. Overnight Market



|                         | <u>Rank*</u> |             |             |             |             |             |             |
|-------------------------|--------------|-------------|-------------|-------------|-------------|-------------|-------------|
|                         | <u>1994</u>  | <u>1995</u> | <u>1996</u> | <u>1997</u> | <u>1998</u> | <u>1999</u> | <u>2000</u> |
| <b>PLEASURE TRIPS</b>   | <b>13</b>    | <b>10</b>   | <b>12</b>   | <b>13</b>   | <b>13</b>   | <b>13</b>   | <b>10</b>   |
| Visit Friends/Relatives | 16           | 15          | 17          | 15          | 18          | 15          | 16          |
| Casino                  | 2            | 2           | 2           | 2           | 2           | 2           | 2           |
| Beach                   | 4            | 4           | 4           | 4           | 4           | 5           | 5           |
| Special Event           | 22           | 29          | 23          | 26          | 31          | 24          | 26          |
| Touring                 | 38           | 39          | 40          | 39          | 43          | 34          | 42          |
| Business/Pleasure       | 29           | 18          | 16          | 22          | 24          | 26          | 25          |
| Outdoor                 | 33           | 24          | 33          | 34          | 47          | 42          | 46          |
| City                    | 20           | 24          | 30          | 28          | 27          | 25          | 26          |
| Theme Park              | 13           | 13          | 12          | 16          | 11          | 16          | 13          |
| Country Resort          | 30           | 36          | 19          | 36          | 25          | 36          | 23          |
| Ski                     | 29           | 29          | 26          | 46          | 36          | 20          | 23          |
| <b>BUSINESS TRIPS</b>   | <b>15</b>    | <b>20</b>   | <b>15</b>   | <b>21</b>   | <b>23</b>   | <b>15</b>   | <b>21</b>   |

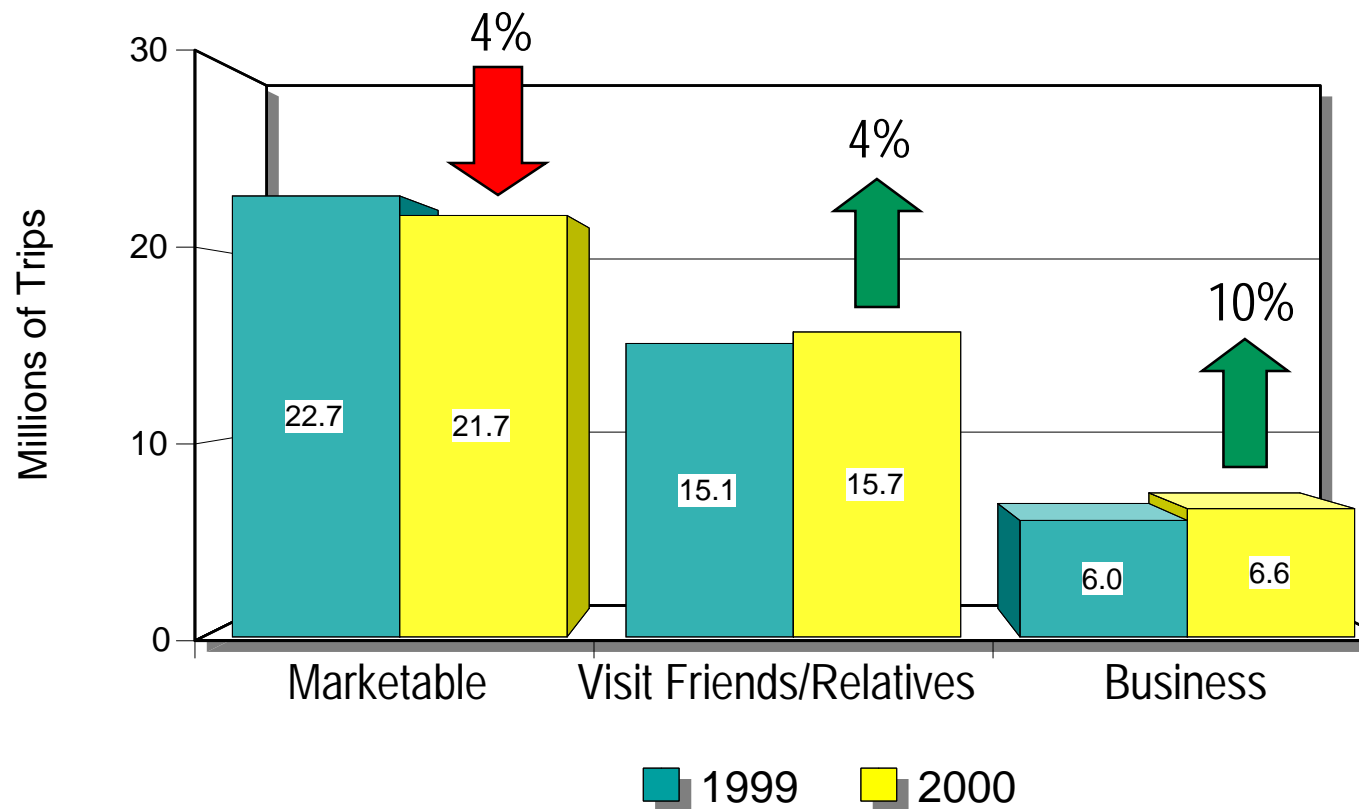
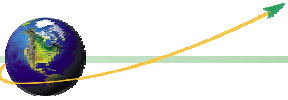
\* Rank of overnight trips among 72 U.S. states and foreign destinations evaluated.

# New Jersey's Share of the U.S. Overnight Travel Market



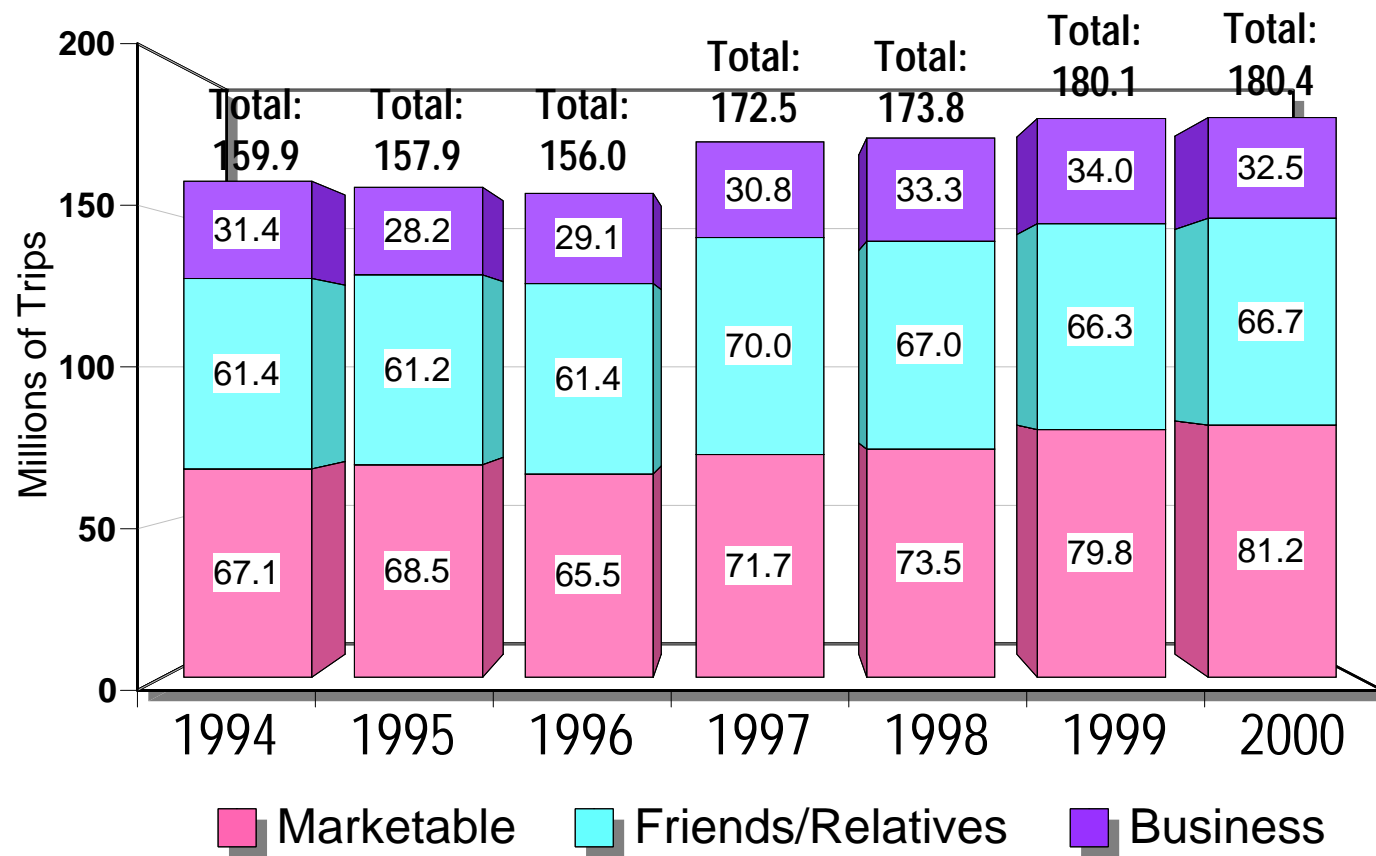
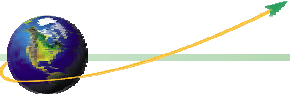
|                         | <u>Market Share</u> |             |             |             |             |             |             |
|-------------------------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|
|                         | <u>1994</u>         | <u>1995</u> | <u>1996</u> | <u>1997</u> | <u>1998</u> | <u>1999</u> | <u>2000</u> |
| <b>PLEASURE TRIPS</b>   | <b>3.1</b>          | <b>3.3</b>  | <b>3.2</b>  | <b>3.2</b>  | <b>3.0</b>  | <b>3.2</b>  | <b>3.2</b>  |
| Visit Friends/Relatives | 2.6                 | 2.9         | 2.6         | 2.7         | 2.5         | 2.6         | 2.7         |
| Casino                  | 19.4                | 18.4        | 17.4        | 17.9        | 17.6        | 18.4        | 15.9        |
| Beach                   | 8.6                 | 8.2         | 8.2         | 7.5         | 7.8         | 6.2         | 7.0         |
| Special Event           | 2.1                 | 1.7         | 1.9         | 2.0         | 1.4         | 1.9         | 1.9         |
| Touring                 | 1.6                 | 1.5         | 1.3         | 1.5         | 1.3         | 1.6         | 1.3         |
| Business/Pleasure       | 1.6                 | 2.3         | 2.4         | 2.0         | 1.9         | 1.8         | 1.8         |
| Outdoor                 | 1.0                 | 1.5         | 1.2         | 1.0         | 0.6         | 0.8         | 0.7         |
| City                    | 2.0                 | 1.4         | 1.1         | 1.4         | 1.5         | 1.8         | 1.4         |
| Theme Park              | 1.4                 | 1.5         | 1.4         | 1.0         | 1.8         | 1.1         | 1.4         |
| Country Resort          | 1.0                 | 0.9         | 2.2         | 0.8         | 1.6         | 1.0         | 1.6         |
| Ski                     | 0.5                 | 0.7         | 0.9         | 0.3         | 0.7         | 1.4         | 1.3         |
| <b>BUSINESS TRIPS</b>   | <b>2.4</b>          | <b>2.2</b>  | <b>2.5</b>  | <b>2.2</b>  | <b>1.9</b>  | <b>2.5</b>  | <b>2.0</b>  |

# Overnight Trips to New Jersey

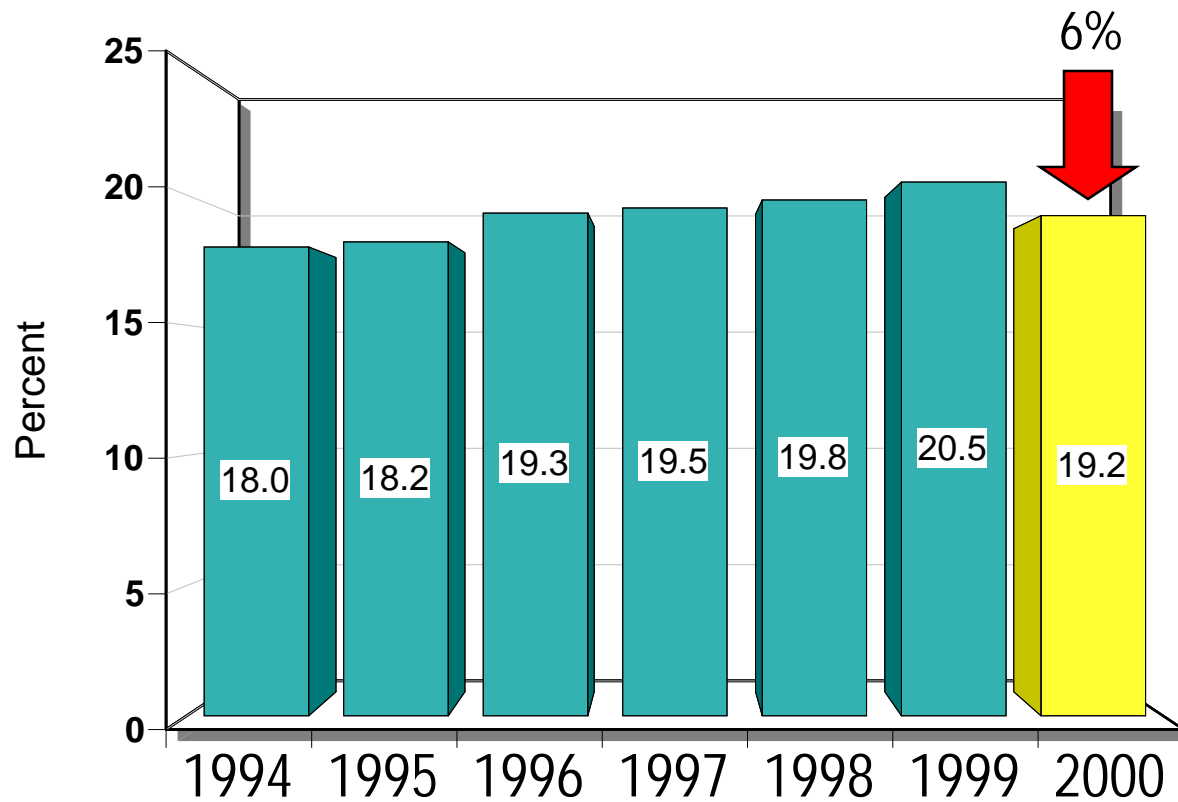
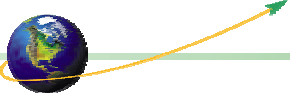




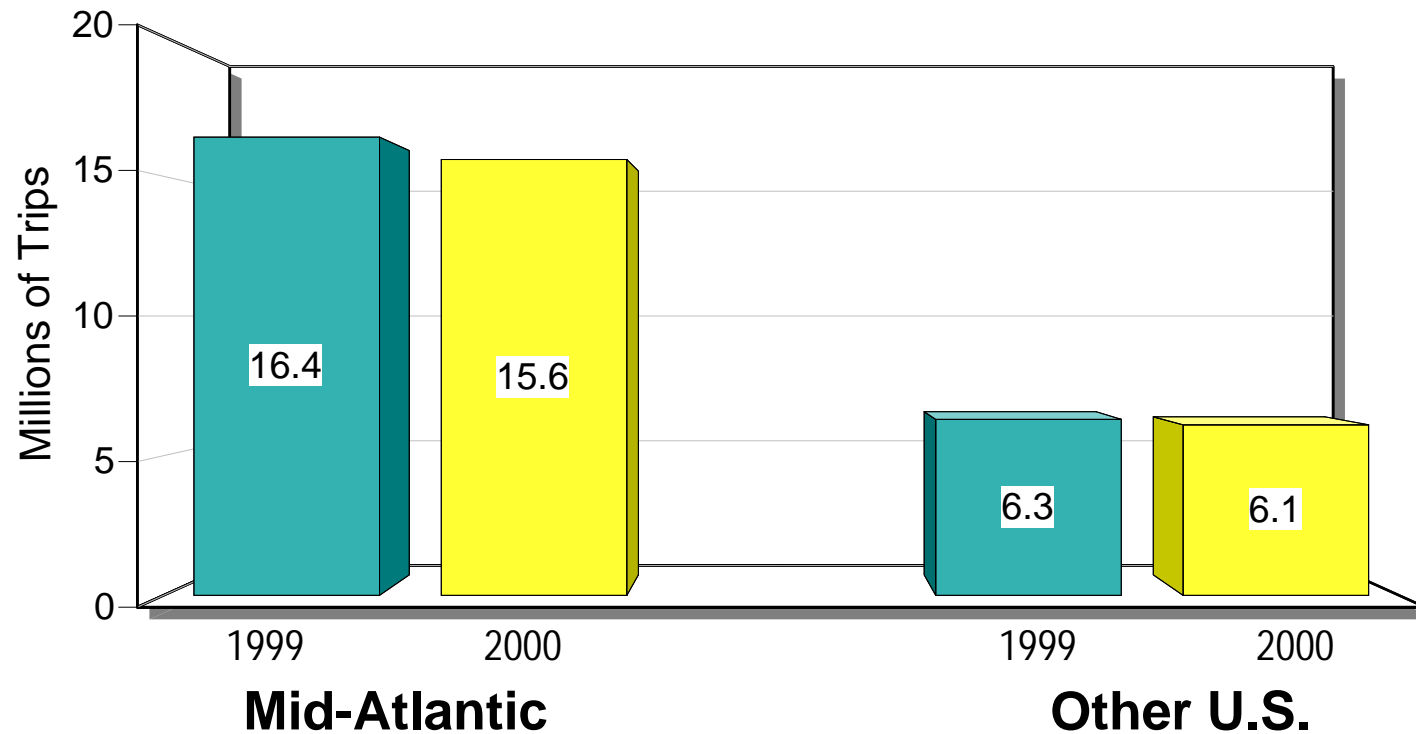
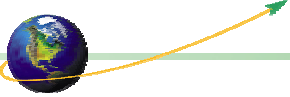
# Overnight Trips by Mid-Atlantic Residents



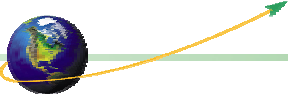
# New Jersey's Share of Mid-Atlantic Overnight "Marketable" Leisure Trips



# Source of Overnight Marketable Leisure Trips to New Jersey



# New Jersey's Sources of Business



## SOURCES OF OVERNIGHT TRIPS

|    | <u>Metropolitan</u> | <u>Estimated<br/>Millions of Trips</u> | <u>Percent</u> |
|----|---------------------|--|----------------|
| 1) | New York            | 11.9                                   | 27             |
| 2) | Philadelphia        | 8.6                                    | 20             |
| 3) | Washington, DC      | 3.6                                    | 8              |
| 4) | Baltimore           | 1.4                                    | 3              |
| 5) | Boston              | 1.1                                    | 2              |

### U.S. States

|    |              |     |    |
|----|--------------|-----|----|
| 1) | Pennsylvania | 9.7 | 22 |
| 2) | New York     | 9.1 | 21 |
| 3) | New Jersey   | 5.8 | 13 |
| 4) | Maryland     | 3.2 | 7  |
| 5) | Virginia     | 2.4 | 5  |

## SOURCES OF DAY TRIPS

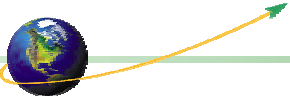
|    | <u>Metropolitan</u>    | <u>Estimated<br/>Millions of Trips</u> | <u>Percent</u> |
|----|------------------------|--|----------------|
| 1) | New York               | 67.8                                   | 54             |
| 2) | Philadelphia           | 48.6                                   | 39             |
| 3) | Washington, D.C.       | 3.3                                    | 3              |
| 4) | Wilkes Barre-Scranton  | 2.6                                    | 2              |
| 5) | Albany-Schenect'y-Troy | 0.9                                    | 1              |

### U.S. States

|    |              |      |    |
|----|--------------|------|----|
| 1) | New Jersey   | 60.1 | 48 |
| 2) | New York     | 33.7 | 27 |
| 3) | Pennsylvania | 27.6 | 22 |
| 4) | Virginia     | 3.3  | 3  |
| 5) | Maryland     | 0.4  | <1 |

\* Note: The metropolitan areas of New York and Philadelphia each include part of the state of New Jersey  
Source: Longwoods International

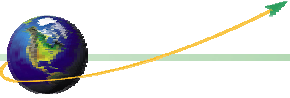
# New Jersey's Sources of Overnight Trips 1994 to 2000



| <u>Metropolitan</u>    | <u>1994</u><br>(Millions) | <u>1995</u><br>(Millions) | <u>1996</u><br>(Millions) | <u>1997</u><br>(Millions) | <u>1998</u><br>(Millions) | <u>1999</u><br>(Millions) | <u>2000</u><br>(Millions) |
|------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|
| 1) New York            | 12.1                      | 12.1                      | 13.0                      | 13.7                      | 13.2                      | 12.6                      | 11.9                      |
| 2) Philadelphia        | 6.3                       | 6.8                       | 6.0                       | 7.3                       | 7.5                       | 8.6                       | 8.6                       |
| 3) Washington, DC      | 1.7                       | 1.7                       | 2.0                       | 2.2                       | 2.3                       | 2.5                       | 3.6                       |
| <br><u>U.S. States</u> |                           |                           |                           |                           |                           |                           |                           |
| 1) New Jersey          | 7.2                       | 7.9                       | 7.6                       | 8.2                       | 8.3                       | 6.7                       | 5.8                       |
| 2) New York            | 7.3                       | 7.5                       | 8.2                       | 8.4                       | 7.4                       | 9.4                       | 9.1                       |
| 3) Pennsylvania        | 6.6                       | 5.9                       | 5.7                       | 7.2                       | 7.4                       | 8.5                       | 9.7                       |

Note: The metropolitan areas of New York and Philadelphia each included part of the state of New Jersey; a   indicated a statistically reliable increase and a   indicates a statistically reliable decrease versus the previous year in terms of the proportion of all trips to each place

# New Jersey's Sources of Day Trips 1994 to 2000

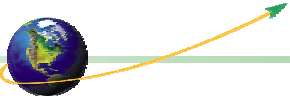


| <u>Metropolitan</u> | <u>1994</u> | <u>1995</u> | <u>1996</u> | <u>1997</u> | <u>1998</u> | <u>1999</u> | <u>2000</u> |
|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
|                     | (Millions)  | (Millions)  | (Millions)  | (Millions)  | (Millions)  | (Millions)  | (Millions)  |
| 1) New York         | 74.3        | 79.3        | 80.7        | 81.6        | 86.2        | 81.6        | 67.8        |
| 2) Philadelphia     | 56.2        | 35.7        | 43.1        | 29.8        | 29.4        | 36.0        | 48.6        |
| 3) Washington D.C.  | 1.2         | 2.3         | 1.5         | 1.1         | 1.5         | 1.3         | 3.3         |

| <u>U.S. States</u> |      |      |      |      |      |      |      |
|--------------------|------|------|------|------|------|------|------|
| 1) New Jersey      | 56.4 | 60.2 | 65.4 | 61.9 | 48.3 | 58.7 | 60.1 |
| 2) New York        | 37.5 | 31.5 | 31.6 | 33.9 | 39.3 | 33.7 | 33.7 |
| 3) Pennsylvania    | 40.2 | 33.2 | 33.0 | 22.4 | 33.7 | 28.8 | 27.6 |

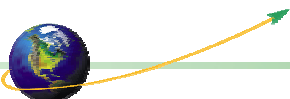
Note: The metropolitan areas of New York and Philadelphia each included part of the state of New Jersey; a   indicated a statistically reliable increase and a   indicates a statistically reliable decrease versus the previous year in terms of the proportion of all trips to each place

# New Jersey's Traveler Profile



|                     | <u>OVERNIGHT TRIPS</u>                 |                | <u>DAY TRIPS</u>                       |                |
|---------------------|--|----------------|--|----------------|
|                     | <u>Estimated<br/>Millions of Trips</u> | <u>Percent</u> | <u>Estimated<br/>Millions of Trips</u> | <u>Percent</u> |
| <b>GENDER</b>       |  |                |  |                |
| Male                | 21.2                                   | 48             | 69.1                                   | 55             |
| Female              | 22.8                                   | 52             | 56.3                                   | 45             |
| <b>AGE</b>          |  |                |  |                |
| 18-34               | 13.1                                   | 30             | 36.7                                   | 29             |
| 35-54               | 17.5                                   | 40             | 44.8                                   | 36             |
| 55+                 | 13.3                                   | 30             | 44.0                                   | 35             |
| <i>Average Age</i>  | <i>45.7</i>                            |                | <i>47.5</i>                            |                |
| <b>EDUCATION</b>    |  |                |  |                |
| High School or Less | 13.1                                   | 30             | 37.9                                   | 30             |
| Some College        | 11.7                                   | 26             | 30.9                                   | 25             |
| College Graduate    | 11.5                                   | 26             | 26.9                                   | 21             |
| Post Graduate       | 7.7                                    | 18             | 29.6                                   | 24             |
| <b>INCOME</b>       |  |                |  |                |
| Under \$25K         | 8.3                                    | 19             | 28.6                                   | 12             |
| \$25K-\$49.9K       | 10.6                                   | 24             | 35.1                                   | 25             |
| \$50K-\$74.9K       | 10.6                                   | 24             | 25.3                                   | 31             |
| \$75K+              | 14.6                                   | 33             | 34.1                                   | 34             |
| <b>RACE</b>         |  |                |  |                |
| White               | 33.9                                   | 77             | 101.5                                  | 81             |
| African-American    | 7.2                                    | 16             | 8.9                                    | 7              |
| Hispanic            | 1.8                                    | 4              | 4.6                                    | 4              |
| Other               | 1.1                                    | 2              | 10.0                                   | 8              |

# New Jersey's Overnight Traveler Profile 1994 to 2000



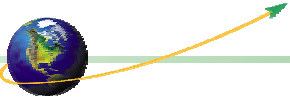
|                             | <u>1994</u> | <u>1995</u> | <u>1996</u> | <u>1997</u> | <u>1998</u> | <u>1999</u> | <u>2000</u> |
|-----------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| <b>GENDER (Millions)</b>    |             |             |             |             |             |             |             |
| Male                        | 17.9        | 18.5        | 18.3        | 20.2        | 19.6        | 20.4        | 21.2        |
| Female                      | 17.9        | 17.7        | 18.9        | 20.6        | 20.4        | 23.4        | 22.8        |
| <b>AGE (Millions)</b>       |             |             |             |             |             |             |             |
| 18-34                       | 11.7        | 11.1        | 12.3        | 12.4        | 10.4        | 13.8        | 13.1        |
| 35-54                       | 13.5        | 14.3        | 14.1        | 15.5        | 17.1        | 17.2        | 17.5        |
| 55+                         | 10.5        | 10.7        | 10.9        | 12.9        | 12.4        | 12.8        | 13.3        |
| <i>Average Age</i>          | 44.2        | 45.4        | 45.2        | 46.2        | 46.6        | 45.3        | 45.7        |
| <b>EDUCATION (Millions)</b> |             |             |             |             |             |             |             |
| High School or Less         | 8.3         | 8.9         | 8.9         | 8.9         | 8.7         | 14.0        | 13.1        |
| Some College                | 8.4         | 7.9         | 8.5         | 10.5        | 8.9         | 11.6        | 11.7        |
| College Graduate            | 11.5        | 12.2        | 12.9        | 14.3        | 14.4        | 10.1        | 11.5        |
| Post Graduate               | 7.6         | 7.1         | 7.0         | 7.1         | 8.0         | 8.0         | 7.7         |
| <b>INCOME (Millions)</b>    |             |             |             |             |             |             |             |
| Under \$25K                 | 7.1         | 6.9         | 7.9         | 8.1         | 6.7         | 8.2         | 8.3         |
| \$25K-\$49.9K               | 12.3        | 12.4        | 12.1        | 11.6        | 10.9        | 12.0        | 10.6        |
| \$50K-\$74.9K               | 8.9         | 8.5         | 9.2         | 10.2        | 9.7         | 9.5         | 10.6        |
| \$75K+                      | 7.5         | 8.3         | 8.0         | 10.9        | 12.7        | 14.1        | 14.6        |
| <b>RACE (Millions)</b>      |             |             |             |             |             |             |             |
| White                       | 29.5        | 29.7        | 31.2        | 33.9        | 33.1        | 33.7        | 33.9        |
| African-American            | 4.4         | 4.9         | 4.7         | 5.1         | 4.9         | 6.8         | 7.2         |
| Hispanic                    | 1.0         | 0.8         | 0.6         | 0.9         | 1.1         | 2.4         | 1.8         |
| Other                       | 0.9         | 0.8         | 0.9         | 1.0         | 0.9         | 0.8         | 1.1         |

Note: A □ indicates a statistically reliable increase, and a ○ , a statistically reliable decrease in terms of the proportion of all trips taken in that category.



# New Jersey's Day Traveler Profile

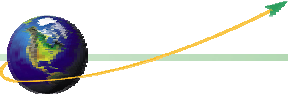
## 1994 to 2000



|                             | <u>1994</u> | <u>1995</u> | <u>1996</u> | <u>1997</u> | <u>1998</u> | <u>1999</u> | <u>2000</u> |
|-----------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| <b>GENDER (Millions)</b>    |             |             |             |             |             |             |             |
| Male                        | 60.3        | 68.5        | 81.5        | 65.3        | 58.3        | 60.1        | 68.9        |
| Female                      | 76.8        | 58.6        | 52.6        | 54.8        | 65.2        | 63.0        | 56.2        |
| <b>AGE (Millions)</b>       |             |             |             |             |             |             |             |
| 18-34                       | 50.6        | 24.7        | 50.1        | 38.8        | 35.2        | 46.0        | 36.6        |
| 35-54                       | 49.5        | 49.3        | 47.5        | 45.8        | 55.0        | 46.5        | 44.6        |
| 55+                         | 36.9        | 53.1        | 36.3        | 35.5        | 33.4        | 30.5        | 43.9        |
| <i>Average Age</i>          | 44.1        | 48.9        | 43.2        | 45.3        | 46.3        | 42.4        | 47.5        |
| <b>EDUCATION (Millions)</b> |             |             |             |             |             |             |             |
| High School or Less         | 41.0        | 43.3        | 48.8        | 35.1        | 34.7        | 30.0        | 37.8        |
| Some College                | 33.4        | 28.2        | 22.8        | 27.1        | 28.0        | 29.1        | 30.9        |
| College Graduate            | 47.8        | 35.8        | 54.8        | 40.6        | 36.7        | 45.2        | 26.9        |
| Post Graduate               | 14.9        | 17.8        | 7.6         | 17.3        | 24.1        | 19.0        | 29.5        |
| <b>INCOME (Millions)</b>    |             |             |             |             |             |             |             |
| Under \$25K                 | 21.4        | 39.8        | 24.3        | 29.3        | 17.3        | 28.6        | 13.4        |
| \$25K-\$49.9K               | 35.9        | 47.         | 34.2        | 32.9        | 39.5        | 35.1        | 30.8        |
| \$50K-\$74.9K               | 44.3        | 23.8        | 38.9        | 39.8        | 35.4        | 25.3        | 38.9        |
| \$75K+                      | 35.6        | 16.3        | 36.7        | 18.1        | 31.4        | 34.1        | 42.1        |
| <b>RACE (Millions)</b>      |             |             |             |             |             |             |             |
| White                       | N/A         | N/A         | 105.3       | 93.3        | 96.6        | 97.2        | 101.7       |
| African-American            | N/A         | N/A         | 12.7        | 15.0        | 11.4        | 11.0        | 10.4        |
| Hispanic                    | N/A         | N/A         | 8.0         | 6.0         | 5.6         | 4.8         | 3.9         |
| Other                       | N/A         | N/A         | 8.0         | 5.8         | 10.0        | 10.2        | 9.1         |

Note: A ☐ indicates a statistically reliable increase, and a ☐, a statistically reliable decrease in terms of the proportion of all trips taken in that category.

# Activities Participated In — Overnight Trips

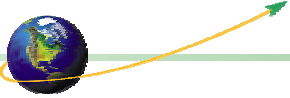


|                                | <u>Estimated<br/>Millions of Trips</u> | <u>Percent</u> |                                       | <u>Estimated<br/>Millions of Trips</u> | <u>Percent</u> |
|--------------------------------|--|----------------|---------------------------------------|--|----------------|
| 1) Casino Gaming               | 17.7                                   | 40             | 19) Fair/Festival/Exhibition          | 0.9                                    | 2              |
| 2) Went To An Ocean Beach      | 10.2                                   | 23             | 20) Birdwatching                      | 0.8                                    | 2              |
| 3) Boardwalk Activities        | 8.8                                    | 20             | 21) Car/Dog/Horse Race                | 0.7                                    | 2              |
| 4) Bar/Disco/Nightclub         | 3.9                                    | 9              | 22) Short Guided Tour                 | 0.7                                    | 2              |
| 5) Swam in A Pool              | 3.6                                    | 8              | 23) Went to a Lakeside Beach          | 0.6                                    | 1              |
| 6) Entertainment/Shows         | 3.5                                    | 8              | 24) Art Gallery                       | 0.6                                    | 1              |
| 7) Landmarks/Historic Sites    | 2.7                                    | 6              | 25) Professional/College Sports Event | 0.6                                    | 1              |
| 8) Miniature Golf              | 2.1                                    | 5              | 26) Golf                              | 0.5                                    | 1              |
| 9) National/State Park         | 2.0                                    | 5              | 27) Power Boating/Sailing             | 0.4                                    | 1              |
| 10) Used a Sauna/Hot Tub       | 1.8                                    | 4              | 28) Rock Concert                      | 0.4                                    | 1              |
| 11) Day Cruise (Not Overnight) | 1.2                                    | 3              | 29) Theater/Dance/Symphony/Opera      | 0.4                                    | 1              |
| 12) Museum/Science Exhibit     | 1.1                                    | 3              | 30) Fishing (Freshwater)              | 0.3                                    | 1              |
| 13) Bicycling                  | 1.1                                    | 3              | 31) Bowling                           | 0.3                                    | 1              |
| 14) Fishing (Saltwater)        | 1.1                                    | 2              | 32) Pick Your Own Farms               | 0.3                                    | 1              |
| 15) Forest/Wildlife Area       | 1.1                                    | 2              | 33) Snow Skiing                       | 0.2                                    | <1             |
| 16) Zoo                        | 1.0                                    | 2              | 34) Tennis                            | 0.2                                    | <1             |
| 17) Theme Park                 | 1.0                                    | 2              | 35) Canoeing/Kayaking                 | 0.1                                    | <1             |
| 18) Hiking                     | 1.0                                    | 2              |                                       |  |                |

Source: Longwoods International

# Activities Participated In

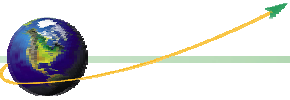
## — Day Trips



|                              | <u>Estimated<br/>Millions of Trips</u> | <u>Percent</u> |                                       | <u>Estimated<br/>Millions of Trips</u> | <u>Percent</u> |
|------------------------------|--|----------------|---------------------------------------|--|----------------|
| 1) Casino Gaming             | 68.0                                   | 54             | 17) Theme Park                        | 3.1                                    | 3              |
| 2) Went To An Ocean Beach    | 30.0                                   | 24             | 19) Theater/Dance/Symphony/Opera      | 2.9                                    | 2              |
| 3) Boardwalk Activities      | 22.4                                   | 18             | 20) Fishing (Saltwater))              | 2.4                                    | 2              |
| 4) Entertainment/Shows       | 15.4                                   | 12             | 21) Miniature Golf                    | 2.3                                    | 2              |
| 5) Swam in A Pool            | 12.6                                   | 10             | 22) Art Gallery                       | 2.3                                    | 2              |
| 6) Power Boating/Sailing     | 11.6                                   | 9              | 23) Swam in A Lake/River              | 1.5                                    | 1              |
| 7) Bar/Disco/Nightclub       | 10.1                                   | 8              | 24) Day Cruise (Not Overnight)        | 1.1                                    | 1              |
| 8) Bowling                   | 9.5                                    | 8              | 25) Zoo                               | 1.1                                    | 1              |
| 9) National/State Park       | 7.6                                    | 6              | 26) Forest/Wildlife Area              | 1.1                                    | 1              |
| 10) Landmarks/Historic Sites | 7.1                                    | 6              | 27) Professional/College Sports Event | 1.0                                    | 1              |
| 11) Fair/Exhibition/Festival | 6.8                                    | 5              | 28) Rock Concert                      | 0.6                                    | 1              |
| 12) Club Offering Live Music | 6.6                                    | 5              | 29) Car/Dog/Horse Race                | 0.4                                    | <1             |
| 13) Used a Sauna/Hot Tub     | 5.5                                    | 4              | 30) Short Guided Tour                 | 0.3                                    | <1             |
| 14) Museum/Science Exhibit   | 5.1                                    | 4              | 31) Tennis                            | 0.3                                    | <1             |
| 15) Golf                     | 4.4                                    | 4              | 32) Surfing                           | 0.3                                    | <1             |
| 16) Hiking                   | 3.8                                    | 3              | 33) Fishing (Freshwater)              | 0.1                                    | <1             |
| 17) Birdwatching             | 3.4                                    | 3              |                                       |  |                |

Source: Longwoods International

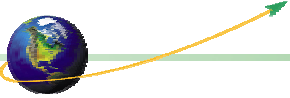
# Activities Participated In On Overnight Trip 1994 to 2000



|                          | <u>1994</u><br>(Millions) | <u>1995</u><br>(Millions) | <u>1996</u><br>(Millions) | <u>1997</u><br>(Millions) | <u>1999</u><br>(Millions) | <u>2000</u><br>(Millions) |
|--------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|
| Casino Gaming            | 13.0                      | 14.1                      | 13.6                      | 15.2                      | 18.2                      | 17.7                      |
| Went to an Ocean Beach   | 8.5                       | 7.7                       | 8.5                       | 9.0                       | 10.0                      | 10.2                      |
| Boardwalk Activities     | 10.4                      | 6.6                       | 7.0                       | 7.6                       | 7.8                       | 8.8                       |
| Entertainment/Shows      | 4.1                       | 4.5                       | 4.7                       | 4.3                       | 4.6                       | 3.5                       |
| Bar/Disco/Nightclub      | 3.8                       | 3.6                       | 3.7                       | 3.4                       | 5.6                       | 3.9                       |
| Landmarks/Historic Sites | 2.5                       | 3.6                       | 3.2                       | 2.9                       | 2.2                       | 2.7                       |
| Swam in a Pool           | 4.3                       | 4.0                       | 2.9                       | 2.9                       | 4.3                       | 3.6                       |
| Miniature Golf           | 2.5                       | 2.7                       | 1.7                       | 2.1                       | 2.2                       | 2.1                       |
| National/State Park      | 0.8                       | 1.8                       | 1.7                       | 1.8                       | 1.8                       | 2.0                       |
| Fair/Exhibition/Festival | 1.0                       | 1.7                       | 1.3                       | 1.2                       | 1.1                       | 0.9                       |

Note: A □ indicates a statistically reliable increase, and a ○ , a statistically reliable decrease versus the previous year in terms of the proportion of all trips taken including that activity.

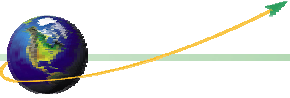
# Activities Participated In On Day Trips 1994 to 2000



|                        | <u>1994</u><br>(Millions) | <u>1995</u><br>(Millions) | <u>1996</u><br>(Millions) | <u>1997</u><br>(Millions) | <u>1999</u><br>(Millions) | <u>2000</u><br>(Millions) |
|------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|
| Casino Gaming          | 34.1                      | 32.7                      | 48.9                      | 41.7                      | 42.7                      | 68.0                      |
| Boardwalk Activities   | 33.2                      | 15.8                      | 26.0                      | 30.7                      | 21.7                      | 22.4                      |
| Went to an Ocean Beach | 20.3                      | 17.0                      | 24.5                      | 25.9                      | 24.7                      | 30.0                      |
| Entertainment/Shows    | 16.6                      | 6.9                       | 13.4                      | 26.4                      | 7.3                       | 15.3                      |
| Bar/Disco/Nightclub    | 20.9                      | 7.2                       | 9.5                       | 14.8                      | 21.5                      | 10.1                      |
| National/State Park    | 16.6                      | 8.5                       | 9.4                       | 14.6                      | 10.8                      | 7.6                       |
| Theme Park             | 20.3                      | 13.5                      | 8.9                       | 12.5                      | 11.9                      | 3.1                       |
| Swam in a Pool         | 4.3                       | 4.0                       | 2.9                       | 3.4                       | 9.2                       | 12.6                      |
| Zoo                    | 8.7                       | 7.5                       | 5.2                       | 4.6                       | 1.9                       | 1.1                       |
| Fishing (Saltwater)    | 5.5                       | 9.4                       | 4.2                       | 3.5                       | 5.0                       | 2.4                       |

Note: A   indicates a statistically reliable increase, and a  , a statistically reliable decrease versus the previous year in terms of the proportion of all trips taken including that activity.

# Size of the New Jersey Travel Party

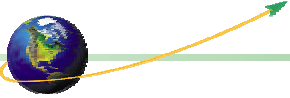


|                                | <b><u>Average #<br/>of People</u></b> |
|--------------------------------|---------------------------------------|
| <b>DAY TRIPS</b>               |                                       |
| Adults                         | 2.3                                   |
| Children*                      | <u>0.4</u>                            |
| <i>Total</i>                   | 2.7                                   |
| <b>OVERNIGHT TRIPS</b>         |                                       |
| Adults                         | 2.2                                   |
| Children*                      | <u>0.4</u>                            |
| <i>Total</i>                   | 2.6                                   |
| <b>DAY AND OVERNIGHT TRIPS</b> |                                       |
| Adults                         | 2.3                                   |
| Children*                      | <u>0.4</u>                            |
| <i>Total</i>                   | 2.7                                   |

\* Under 18

Source: Longwoods International

# Length of Stay on Overnight Trips and Accommodations Used

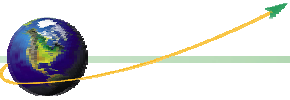


**Average Length of Stay in New Jersey = 3.45 Nights**  
**Total Trip Nights = 144.8 Million**

| <u>Type of Accommodation</u> | <u>Estimated Millions<br/>of Trip Nights</u> | <u>Percent</u> |
|------------------------------|--|----------------|
| Hotel or Motel               | 61.9   | 43             |
| Home of Friends/Relatives    | 49.5   | 34             |
| Rented Cottage               | 9.6  | 7              |
| Own House                    | 7.3  | 5              |
| Seasonal Rental              | 5.7  | 4              |
| Condominium                  | 2.5  | 2              |
| Country Inn/Bed & Breakfast  | 2.4  | 2              |
| Other                        | 5.9  | 4              |

Source: Longwoods International

# Places Seen/Visited or Experienced — Overnight Trips

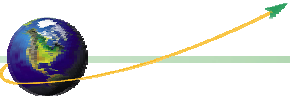


|                                    | <u>%</u> | <u>Estimated<br/>Millions of Trips</u> |
|------------------------------------|----------|--|
| Atlantic City                      | 37       | 16.3                                   |
| Cape May                           | 9        | 4.0                                    |
| Newark Airport                     | 7        | 3.2                                    |
| Brigantine                         | 6        | 2.7                                    |
| Wildwood Boardwalk                 | 6        | 2.6                                    |
| Ocean City                         | 6        | 2.6                                    |
| Ocean City Boardwalk               | 6        | 2.5                                    |
| Cape May Lighthouse                | 5        | 2.3                                    |
| The Wildwoods                      | 5        | 2.3                                    |
| Stone Harbor                       | 4        | 1.7                                    |
| Toms River                         | 4        | 1.5                                    |
| Barnegat Baymen's & Decoy Museum   | 3        | 1.2                                    |
| Long Beach Island                  | 3        | 1.2                                    |
| Avalon                             | 3        | 1.1                                    |
| Elizabeth (Part of Newark Airport) | 3        | 1.1                                    |
| Newark                             | 3        | 1.1                                    |
| Margate                            | 3        | 1.1                                    |
| Seaside Heights                    | 3        | 1.1                                    |
| Port Norris                        | 2        | 1.1                                    |
| Historic Smithville                | 2        | 1.1                                    |
| New Brunswick (Rutgers)            | 2        | 1.1                                    |
| Point Pleasant Beach               | 2        | 1.1                                    |
| Trenton                            | 2        | 1.0                                    |
| Paramus Malls                      | 2        | 1.0                                    |
| Lucy the Elephant/Margate          | 2        | 0.9                                    |
| Delaware Water Gap Recreation Area | 2        | 0.9                                    |
| Ikea Shopping Center               | 2        | 0.8                                    |
| Princeton                          | 2        | 0.8                                    |
| Historic Morristown                | 2        | 0.8                                    |

|   | <u>%</u> | <u>Estimated<br/>Millions of Trips</u> |
|---|----------|--|
| Cape May Wildlife Refuge/Bird Observatory | 2        | 0.8                                    |
| Belmar                                    | 2        | 0.8                                    |
| Six Flags Great Adventure                 | 2        | 0.8                                    |
| Liberty State Park/Science Center         | 2        | 0.7                                    |
| Secaucus Outlet Shops                     | 2        | 0.7                                    |
| Wayne                                     | 2        | 0.7                                    |
| Mount Holly                               | 2        | 0.7                                    |
| Meadowlands Sports Complex                | 1        | 0.6                                    |
| Ocean Grove                               | 1        | 0.6                                    |
| Hoboken/NJ Waterfront                     | 1        | 0.5                                    |
| NJ State Aquarium/Camden                  | 1        | 0.5                                    |
| Flemington                                | 1        | 0.5                                    |
| Lambertville                              | 1        | 0.5                                    |
| Statue of Liberty/Ellis Island            | 1        | 0.5                                    |
| Historic Gardner's Basin                  | 1        | 0.5                                    |
| Passaic                                   | 1        | 0.4                                    |
| Sandy Hook Gateway Recreation Area        | 1        | 0.4                                    |
| Woodbury                                  | 1        | 0.4                                    |
| Pine Barrens                              | 1        | 0.4                                    |
| Great Falls Historic District/Paterson    | 1        | 0.4                                    |
| Island Beach State Park                   | 1        | 0.4                                    |
| Appel Farm/Elmer                          | 1        | 0.4                                    |
| Mountain Creek                            | 1        | 0.3                                    |
| Wheaton Village                           | 1        | 0.3                                    |
| Freehold/Monmouth Park                    | 1        | 0.3                                    |
| Lakehurst                                 | 1        | 0.3                                    |
| Antiquing                                 | 1        | 0.3                                    |
| Somerville                                | 1        | 0.3                                    |
| Short Hills Mall                          | 1        | 0.3                                    |

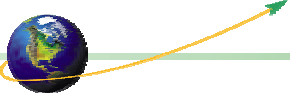


# Places Seen/Visited or Experienced – Overnight Trips (Cont'd)



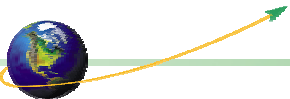
|   | <u>%</u> | <u>Estimated<br/>Millions of Trips</u> |   | <u>%</u> | <u>Estimated<br/>Millions of Trips</u> |
|---|----------|--|---|----------|--|
| Renault Winery                          | 1        | 0.3                                    | Kean College                              | <1       | 0.1                                    |
| Jenkinson's Aquarium                    | 1        | 0.3                                    | Scotch Plains                             | <1       | 0.1                                    |
| Spring Lake                             | 1        | 0.3                                    | Forsyth Wildlife Reserve                  | <1       | 0.1                                    |
| Burlington City                         | 1        | 0.3                                    | Patriots Minor League Baseball Team       | <1       | 0.1                                    |
| Bridgewater Commons                     | 1        | 0.2                                    | Waterloo Village                          | <1       | 0.1                                    |
| Lake Hopatcong                          | 1        | 0.2                                    | Classic Car Show                          | <1       | 0.1                                    |
| Hereford Inlet Lighthouse               | 1        | 0.2                                    | Wings 'n Water Festival                   | <1       | 0.1                                    |
| Story Book Land                         | 1        | 0.2                                    | Mahwah Tennis Classic                     | <1       | 0.1                                    |
| Garden State Park                       | 1        | 0.2                                    | Aviation Museum/Hall of Fame/Teterboro    | <1       | 0.1                                    |
| Duke Gardens                            | <1       | 0.2                                    | Plainfield                                | <1       | 0.1                                    |
| Franklin Mineral Museum/Sterling Mine   | <1       | 0.2                                    | Port at Elizabeth                         | <1       | 0.1                                    |
| Highpoint State Park                    | <1       | 0.2                                    | Marine Mammal Stranding Center/Brigantine | <1       | 0.1                                    |
| Bridgeton                               | <1       | 0.2                                    | Noyes Museum of Art                       | <1       | 0.1                                    |
| Irish Festival                          | <1       | 0.2                                    | Allaire State Park                        | <1       | 0.1                                    |
| Wetland Institute                       | <1       | 0.2                                    | Riverfest/Red Bank                        | <1       | 0.1                                    |
| Presby Gardens/Montclair                | <1       | 0.2                                    | Tuckerton Seaport                         | <1       | 0.1                                    |
| Springfield Battlegrounds/Presb. Church | <1       | 0.2                                    | Finn's Point National Cemetery            | <1       | 0.1                                    |
| Westfield                               | <1       | 0.2                                    | Fort Mott State Park                      | <1       | 0.1                                    |
| Blockbuster-Sony Entertainment Center   | <1       | 0.2                                    | Historic Society Museum                   | <1       | 0.1                                    |
| Cowtown Rodeo/Woodstown                 | <1       | 0.2                                    | Mullica Hill                              | <1       | 0.1                                    |
| Delaware/Raritan Canal State Park       | <1       | 0.2                                    | Salem                                     | <1       | 0.1                                    |
| Mercer County Waterfront Stadium        | <1       | 0.2                                    | Red Bank Battlefield                      | <1       | 0.1                                    |
| Washington Crossing State Park          | <1       | 0.2                                    | Swedesboro                                | <1       | 0.1                                    |
| Historic Chester                        | <1       | 0.1                                    | Morris Museum                             | <1       | <0.1                                   |
| Wild West City                          | <1       | 0.1                                    | Round Valley/Spruce Run Reservation       | <1       | <0.1                                   |
| East Point Lighthouse                   | <1       | 0.1                                    | Tour of Somerville                        | <1       | <0.1                                   |
| Edison National Historic Site           | <1       | 0.1                                    | US Golf Association Golf House Museum     | <1       | <0.1                                   |

# Places Seen/Visited or Experienced – Overnight Trips (Cont'd)



|                                   | <u>%</u> | <u>Estimated<br/>Millions of Trips</u> |
|-----------------------------------|----------|--|
| Cape May Victorian Week           | <1       | <0.1                                   |
| Delaware Bay Schooner             | <1       | <0.1                                   |
| Fortescue                         | <1       | <0.1                                   |
| Seafarers Weekend                 | <1       | <0.1                                   |
| Medieval Times                    | <1       | <0.1                                   |
| Newark Museum                     | <1       | <0.1                                   |
| Paper Mill Playhouse              | <1       | <0.1                                   |
| Princeton Forestal Center         | <1       | <0.1                                   |
| Ringwood/Skylands Gardens         | <1       | <0.1                                   |
| State Street Theater              | <1       | <0.1                                   |
| Miss America Pageant              | <1       | <0.1                                   |
| Festival of the Atlantic Concerts | <1       | <0.1                                   |
| Monmouth Battlefield              | <1       | <0.1                                   |
| Twin Lights of Navesink           | <1       | <0.1                                   |
| Batsto Villiage                   | <1       | <0.1                                   |
| Jockey Hollow at Morristown       | <1       | <0.1                                   |
| NJ Shakespeare Festival           | <1       | <0.1                                   |
| Peters Valley Craft Fair          | <1       | <0.1                                   |
| Cape May Music Festival           | <1       | <0.1                                   |
| American Labor Museum/Botto House | <1       | <0.1                                   |
| Spirit of NJ                      | <1       | <0.1                                   |
| Summit Hotel                      | <1       | <0.1                                   |
| NJ Seafood Festival               | <1       | <0.1                                   |
| Ocean County Decoy & Gunning Show | <1       | <0.1                                   |
| NJ State Fair                     | <1       | <0.1                                   |

# Distribution of Trips By Month



## OVERNIGHT TRIPS

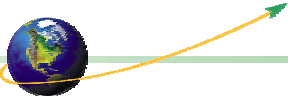
|           | <u>Estimated<br/>Millions of Trips</u> | <u>Percent</u> |
|-----------|--|----------------|
| January   | 2.6                                    | 6              |
| February  | 2.6                                    | 6              |
| March     | 3.3                                    | 7              |
| April     | 2.9                                    | 7              |
| May       | 3.5                                    | 8              |
| June      | 4.7                                    | 11             |
| July      | 5.1                                    | 11             |
| August    | 5.4                                    | 12             |
| September | 3.9                                    | 10             |
| October   | 3.1                                    | 7              |
| November  | 3.7                                    | 8              |
| December  | 3.1                                    | 7              |

## DAY TRIPS

|           | <u>Estimated<br/>Millions of Trips</u> | <u>Percent</u> |
|-----------|--|----------------|
| January   | 10.9                                   | 9              |
| February  | 12.5                                   | 10             |
| March     | 8.5                                    | 7              |
| April     | 8.5                                    | 7              |
| May       | 9.0                                    | 7              |
| June      | 14.3                                   | 11             |
| July      | 10.7                                   | 9              |
| August    | 13.5                                   | 11             |
| September | 10.2                                   | 8              |
| October   | 14.3                                   | 11             |
| November  | 7.4                                    | 6              |
| December  | 5.6                                    | 4              |

Source: Longwoods International

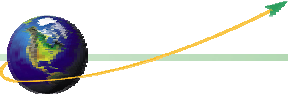
# Distribution of Overnight Trips By Month 1994 to 2000



|           | <u>1994</u><br>(Millions) | <u>1995</u><br>(Millions) | <u>1996</u><br>(Millions) | <u>1997</u><br>(Millions) | <u>1998</u><br>(Millions) | <u>1999</u><br>(Millions) | <u>2000</u><br>(Millions) |
|-----------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|
| January   | 1.4                       | 1.9                       | 1.9                       | 2.2                       | 2.2                       | 2.5                       | 2.6                       |
| February  | 1.4                       | 1.6                       | 1.6                       | 1.9                       | 2.1                       | 2.5                       | 2.6                       |
| March     | 1.8                       | 2.2                       | 2.3                       | 2.8                       | 2.3                       | 3.1                       | 3.3                       |
| April     | 2.1                       | 2.1                       | 2.5                       | 2.4                       | 2.6                       | 3.5                       | 2.9                       |
| May       | 2.9                       | 3.2                       | 3.3                       | 3.4                       | 3.6                       | 3.7                       | 3.5                       |
| June      | 4.3                       | 4.4                       | 4.5                       | 4.2                       | 5.0                       | 5.2                       | 4.7                       |
| July      | 4.7                       | 4.5                       | 3.9                       | 4.5                       | 4.7                       | 5.0                       | 5.1                       |
| August    | 4.7                       | 4.4                       | 4.5                       | 4.9                       | 4.6                       | 5.1                       | 5.4                       |
| September | 3.6                       | 3.4                       | 3.1                       | 3.7                       | 4.0                       | 3.9                       | 4.2                       |
| October   | 3.6                       | 2.7                       | 3.1                       | 3.5                       | 2.9                       | 3.0                       | 3.1                       |
| November  | 2.5                       | 2.7                       | 2.9                       | 3.6                       | 2.9                       | 2.8                       | 3.7                       |
| December  | 2.9                       | 3.1                       | 3.4                       | 3.7                       | 3.2                       | 3.4                       | 3.1                       |

Note: A ☐ indicates a statistically reliable increase, and a ☐ , a statistically decrease versus the previous year in terms of the proportion of all trips taken during that time period.

# Distribution of Day Trips By Month 1994 to 2000



|           | <u>1994</u><br>(Millions) | <u>1995</u><br>(Millions) | <u>1996</u><br>(Millions) | <u>1997</u><br>(Millions) | <u>1998</u><br>(Millions) | <u>1999</u><br>(Millions) | <u>2000</u><br>(Millions) |
|-----------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|
| January   | 9.6                       | 11.0                      | 7.0                       | 5.3                       | 9.3                       | 7.1                       | 10.9                      |
| February  | 9.6                       | 14.4                      | 7.6                       | 5.4                       | 8.8                       | 8.9                       | 12.5                      |
| March     | 11.0                      | 13.3                      | 9.1                       | 6.9                       | 11.8                      | 9.6                       | 8.5                       |
| April     | 6.9                       | 7.8                       | 9.0                       | 8.7                       | 5.1                       | 7.4                       | 8.5                       |
| May       | 8.2                       | 8.9                       | 14.1                      | 10.2                      | 8.2                       | 11.2                      | 9.0                       |
| June      | 13.7                      | 14.2                      | 15.5                      | 16.1                      | 12.9                      | 15.2                      | 14.3                      |
| July      | 20.6                      | 11.5                      | 16.2                      | 15.7                      | 16.3                      | 13.4                      | 10.7                      |
| August    | 20.6                      | 11.2                      | 16.2                      | 17.4                      | 21.2                      | 14.0                      | 13.5                      |
| September | 16.5                      | 10.6                      | 15.2                      | 11.7                      | 7.5                       | 12.6                      | 10.2                      |
| October   | 8.2                       | 10.0                      | 11.5                      | 9.4                       | 9.7                       | 8.7                       | 14.3                      |
| November  | 6.9                       | 7.1                       | 6.3                       | 7.0                       | 6.7                       | 7.5                       | 7.4                       |
| December  | 6.9                       | 7.0                       | 6.4                       | 6.3                       | 3.6                       | 7.6                       | 5.6                       |

Note: A ☐ indicates a statistically reliable increase, and a ☐ , a statistically decrease versus the previous year in terms of the proportion of all trips taken during that time period.

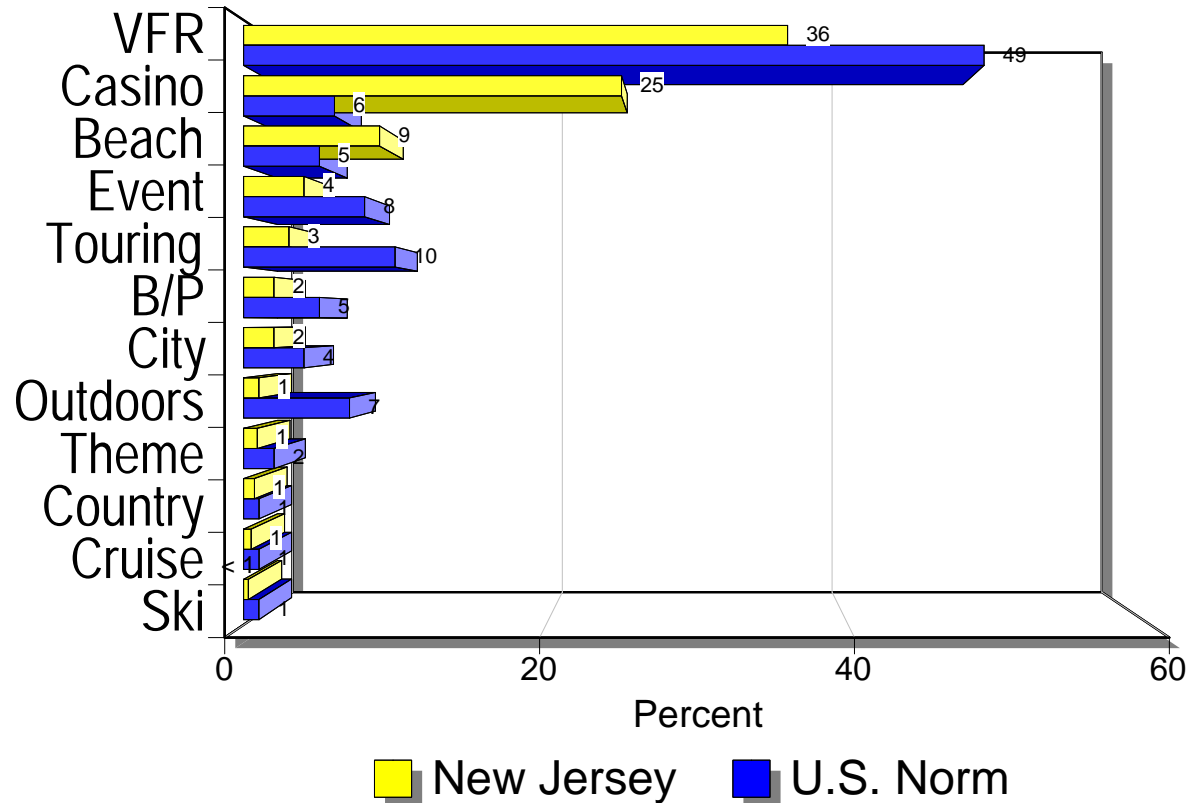
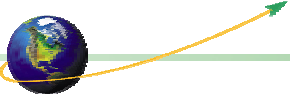


# New Jersey's Pleasure Travel Market



## Pleasure Travel Profile

# Main Purpose of Overnight Pleasure Trips vs. The U.S. Norm

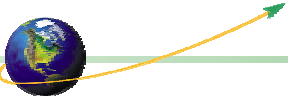




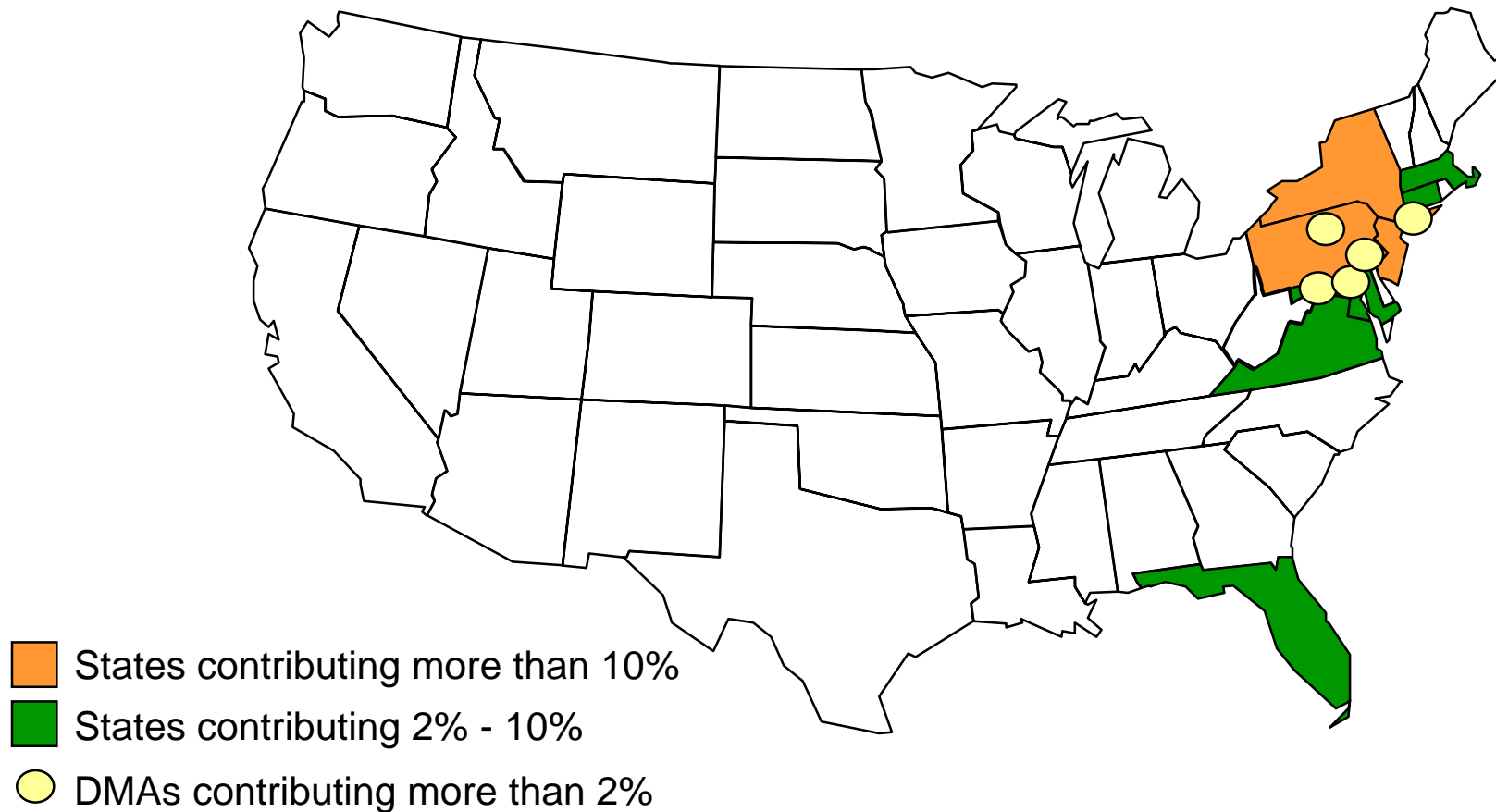


## Sources of Business

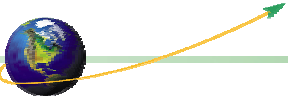
# Sources of Business



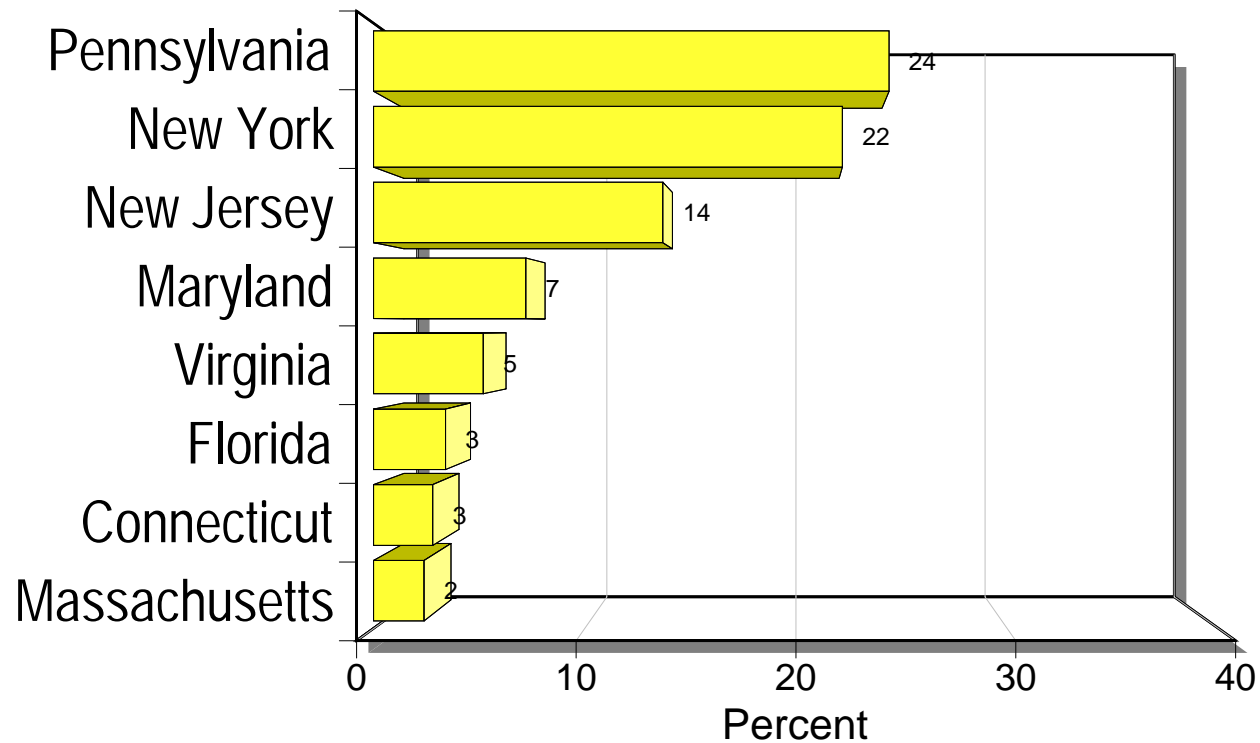
Base: Overnight Marketable Trips



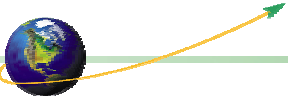
# State Sources of Business



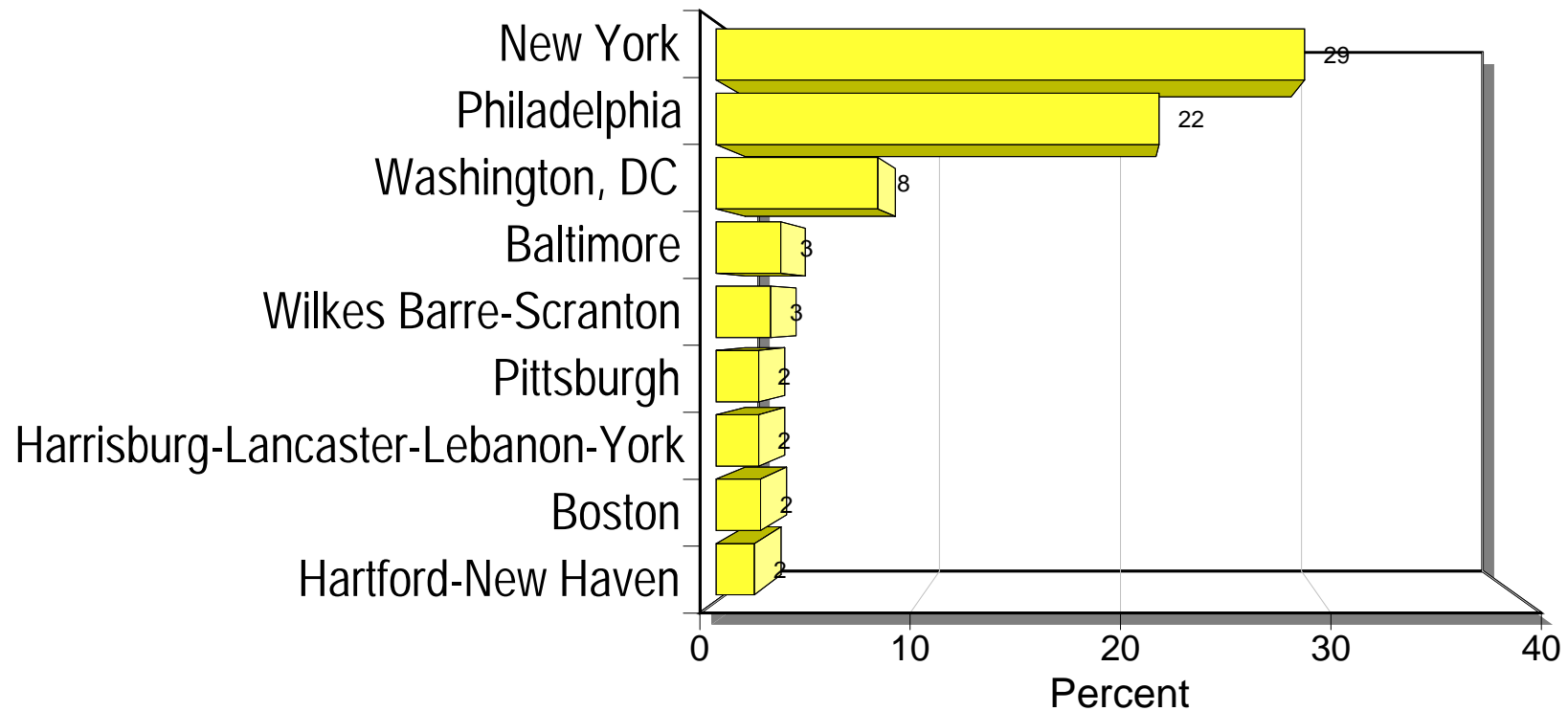
Base: Overnight Pleasure Trips



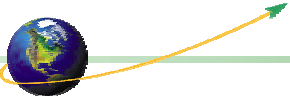
# Urban Sources of Business



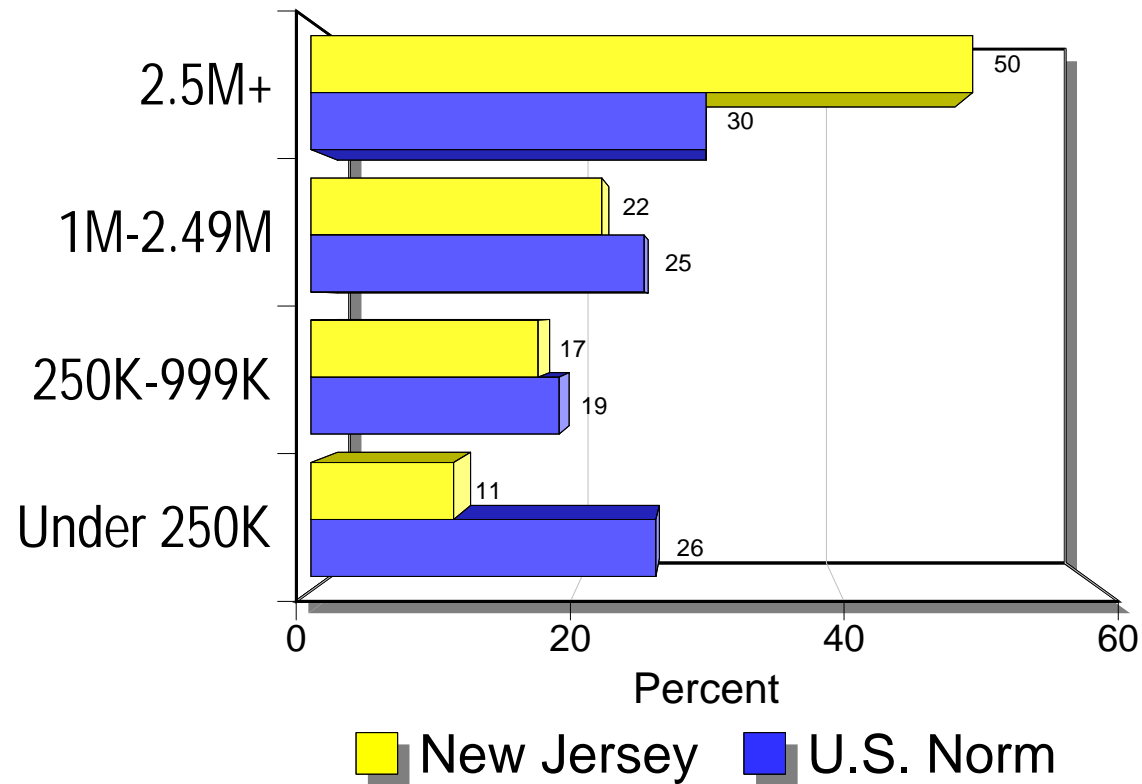
Base: Overnight Pleasure Trips



# Community Size



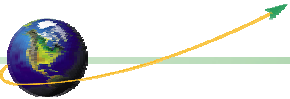
Base: Overnight Pleasure Trips



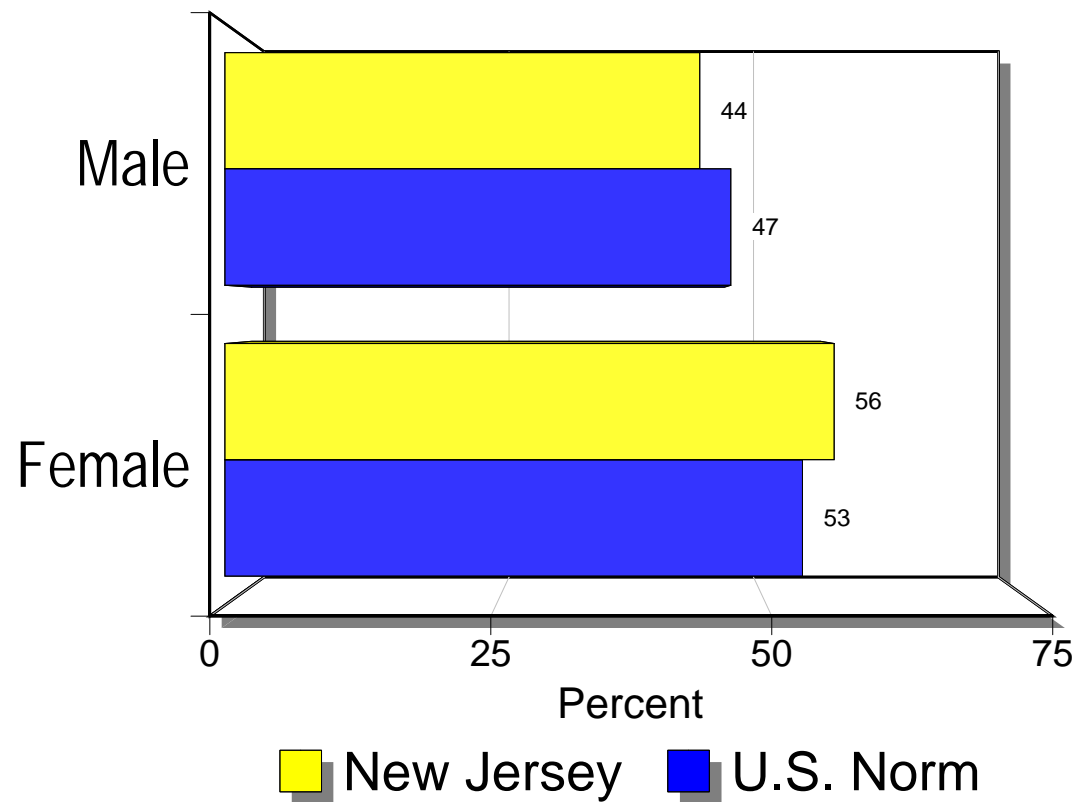


## Demographics

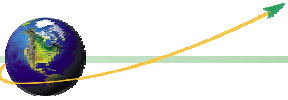
# Gender



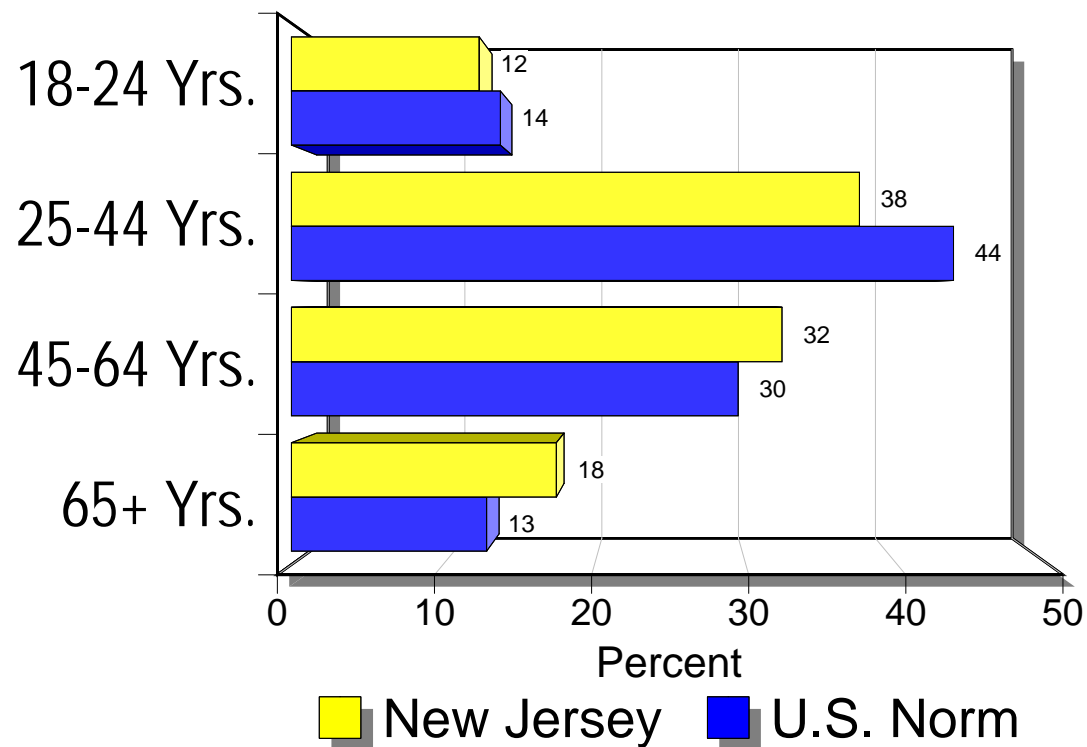
Base: Overnight Pleasure Trips



# Age



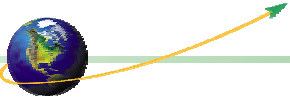
Base: Overnight Pleasure Trips



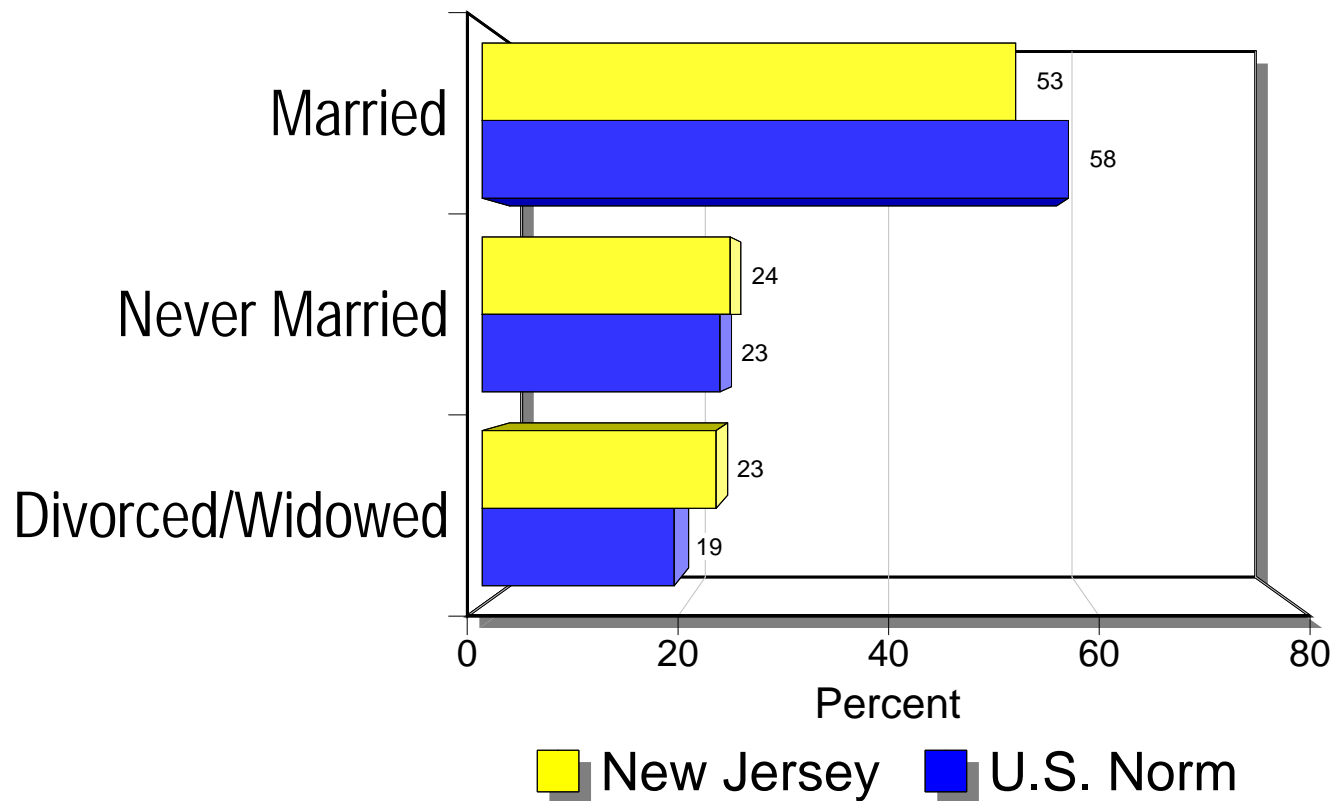
|             | <u>New Jersey</u> | <u>U.S. Norm</u> |
|-------------|-------------------|------------------|
| Average Age | 46.0              | 43.1             |



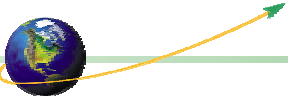
# Marital Status



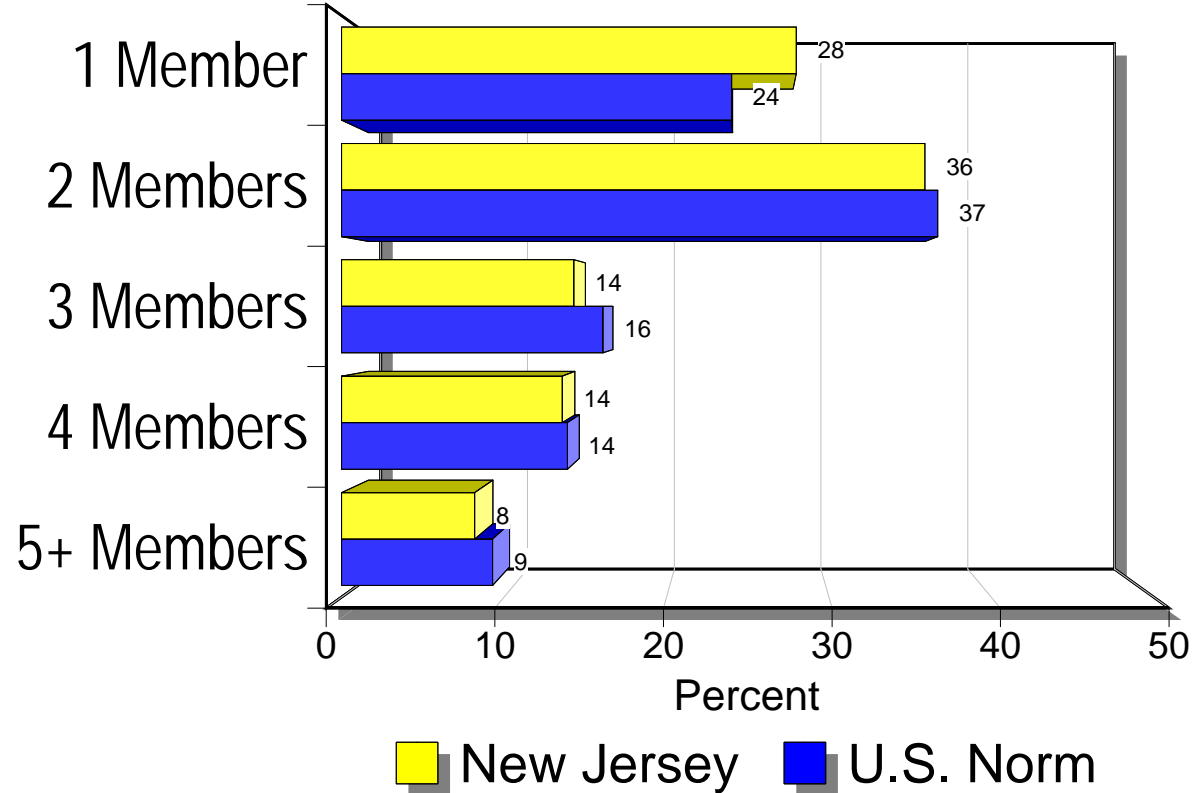
Base: Overnight Pleasure Trips



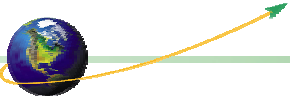
# Household Size



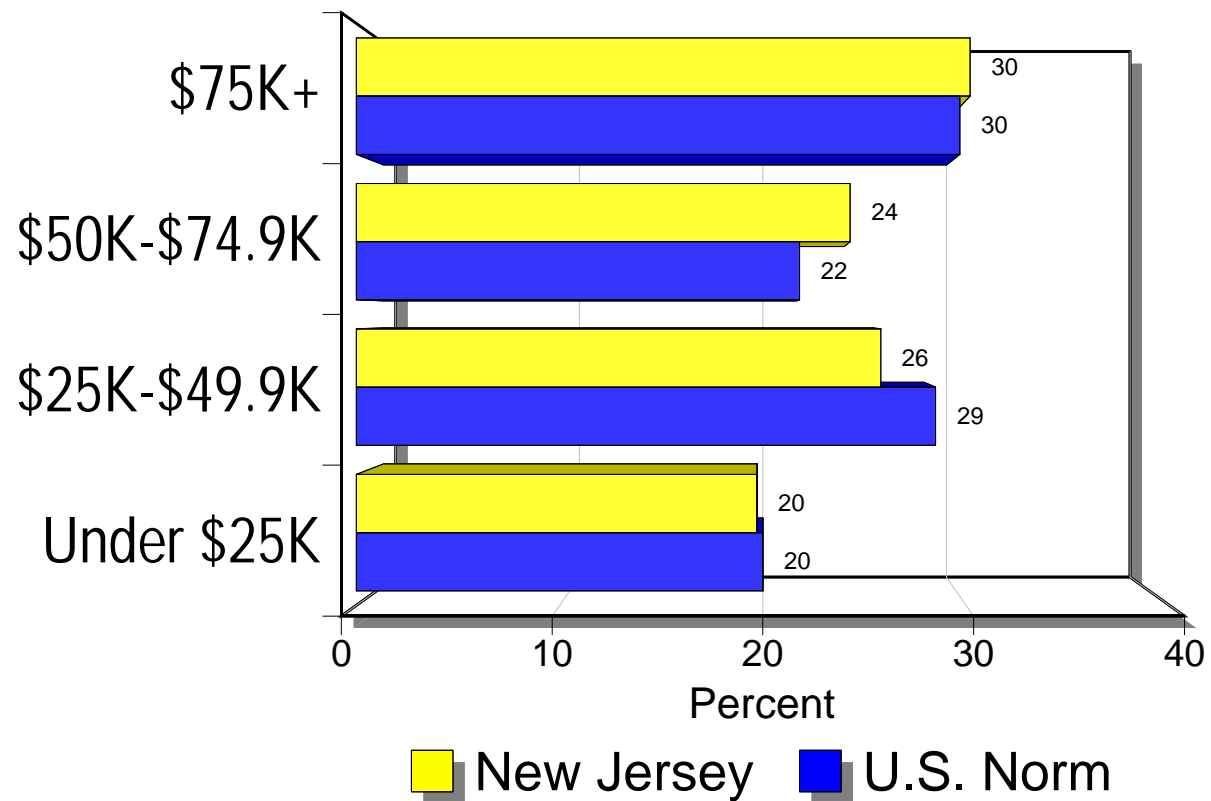
Base: Overnight Pleasure Trips



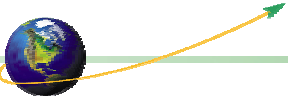
# Income



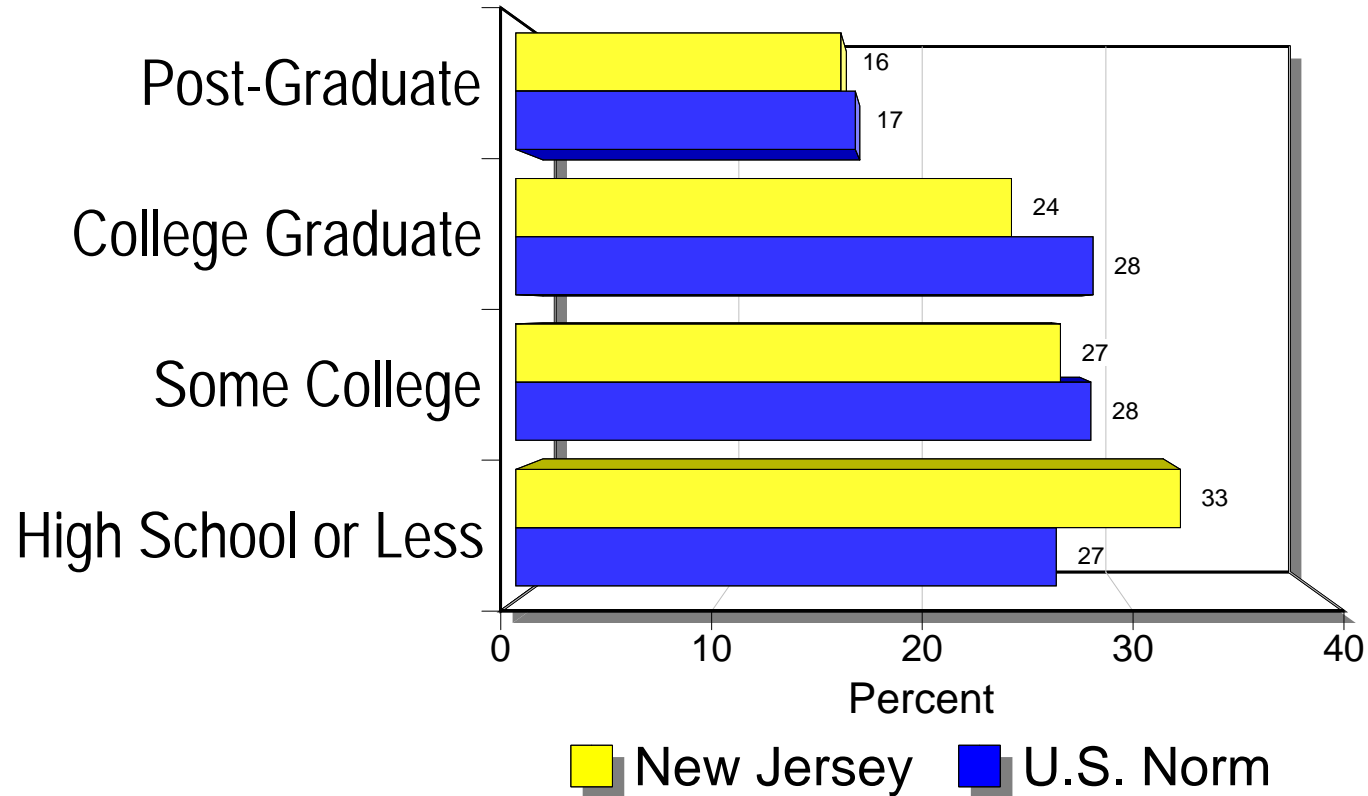
Base: Overnight Pleasure Trips



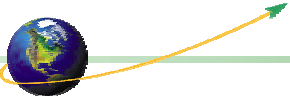
# Education



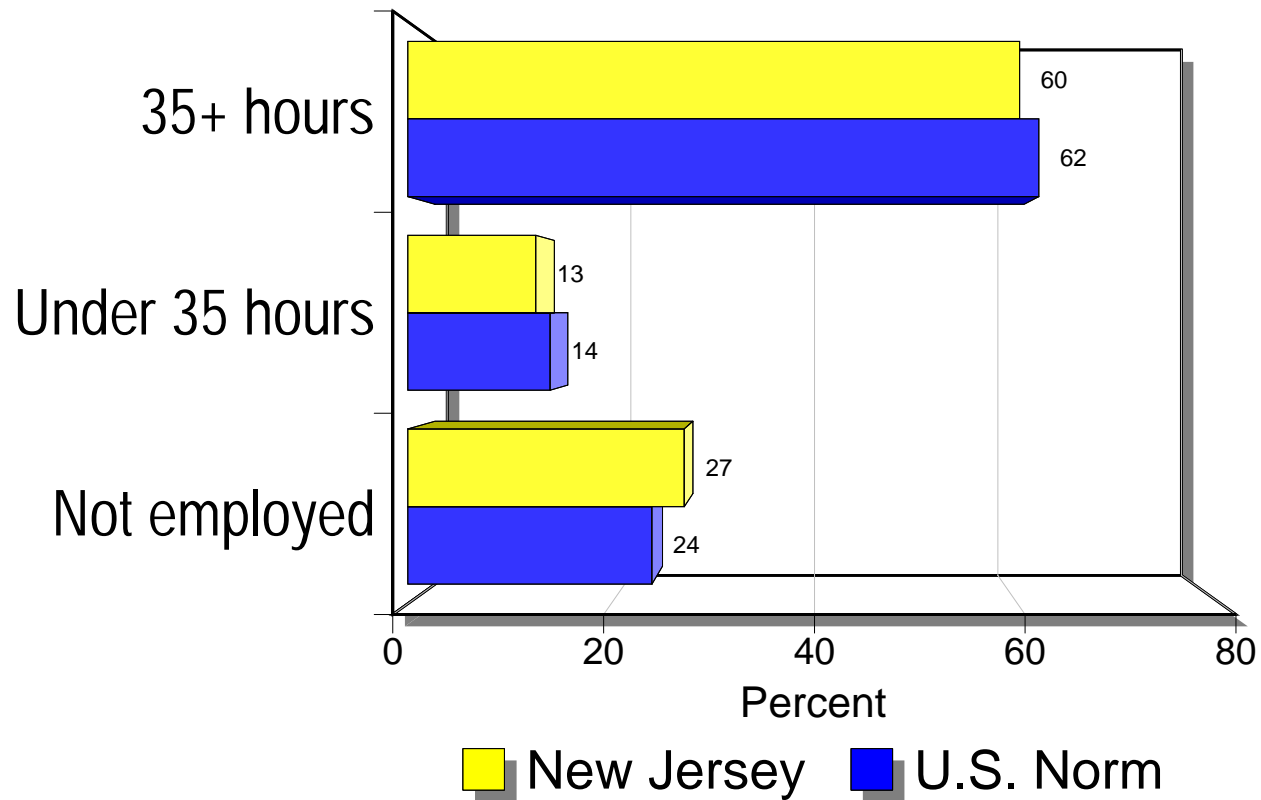
Base: Overnight Pleasure Trips



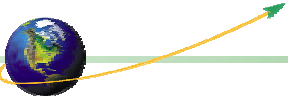
# Employment



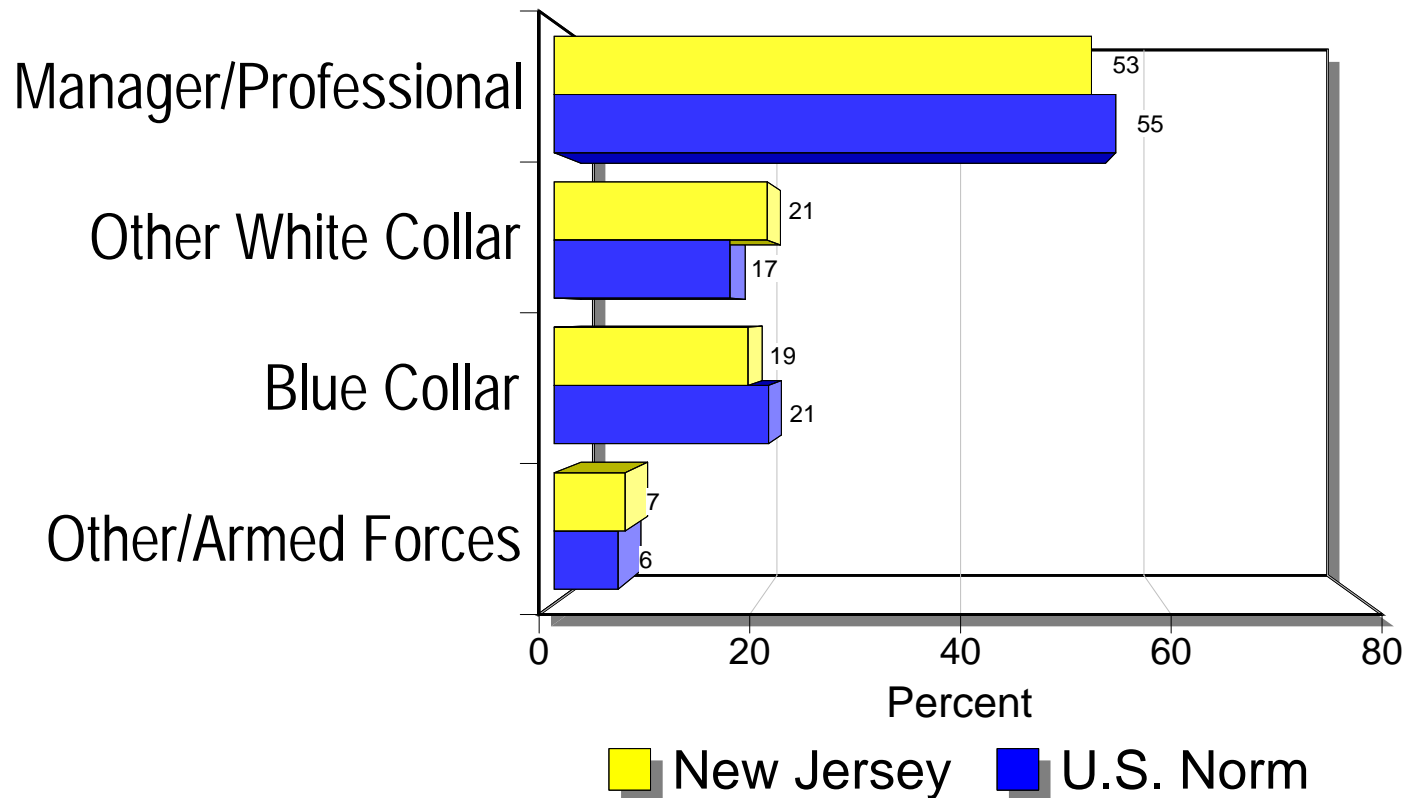
Base: Overnight Pleasure Trips



# Occupation



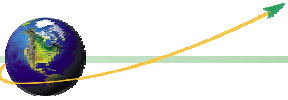
Base: Overnight Pleasure Trips by Those Who Are Employed



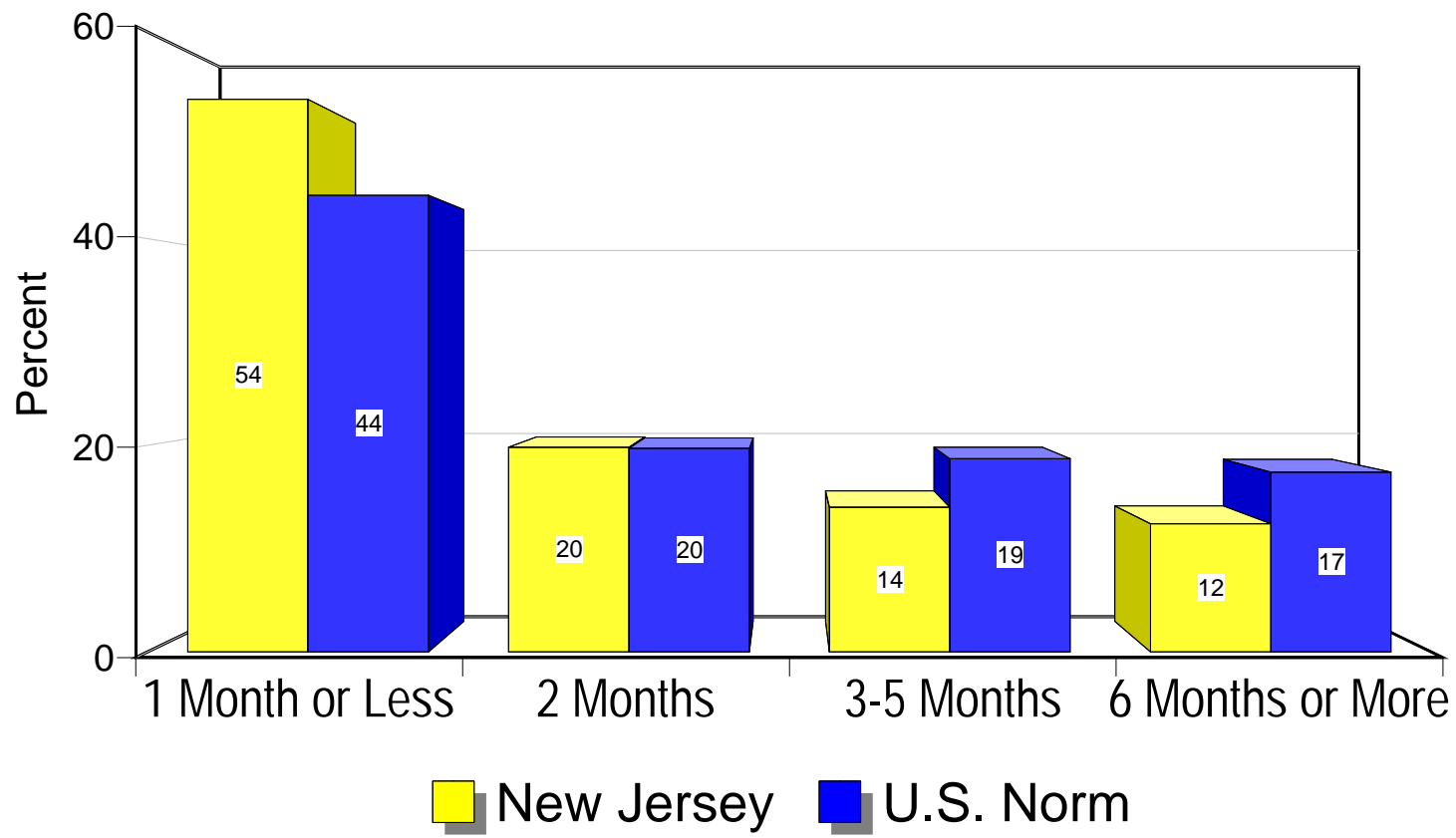


## Trip Planning and Booking

# Planning Cycle

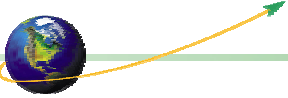


Base: Overnight Pleasure Trips

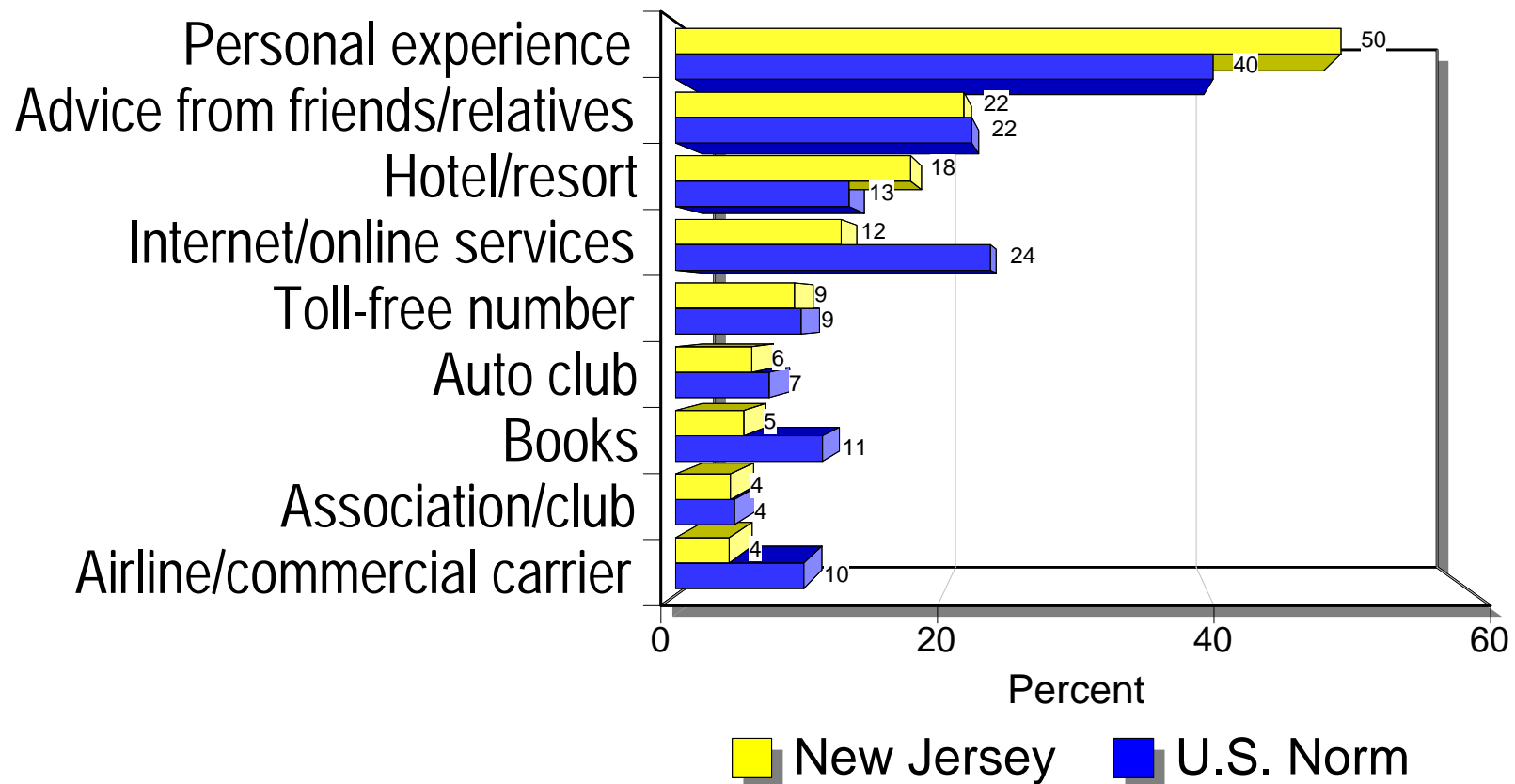




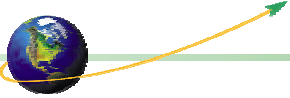
# Information Sources Used for Planning



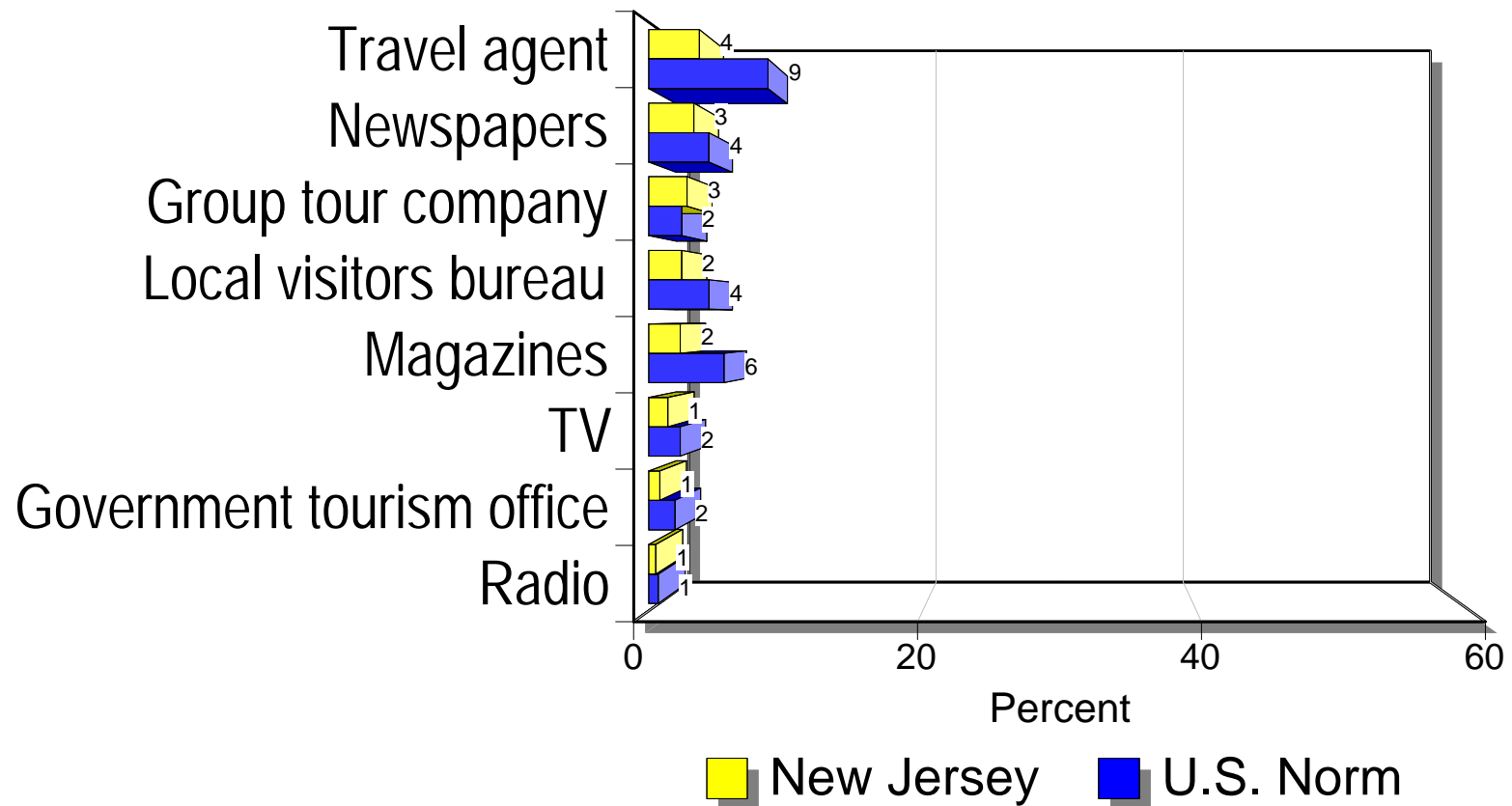
Base: Overnight Pleasure Trips



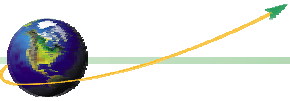
# Information Sources Used for Planning (Cont'd)



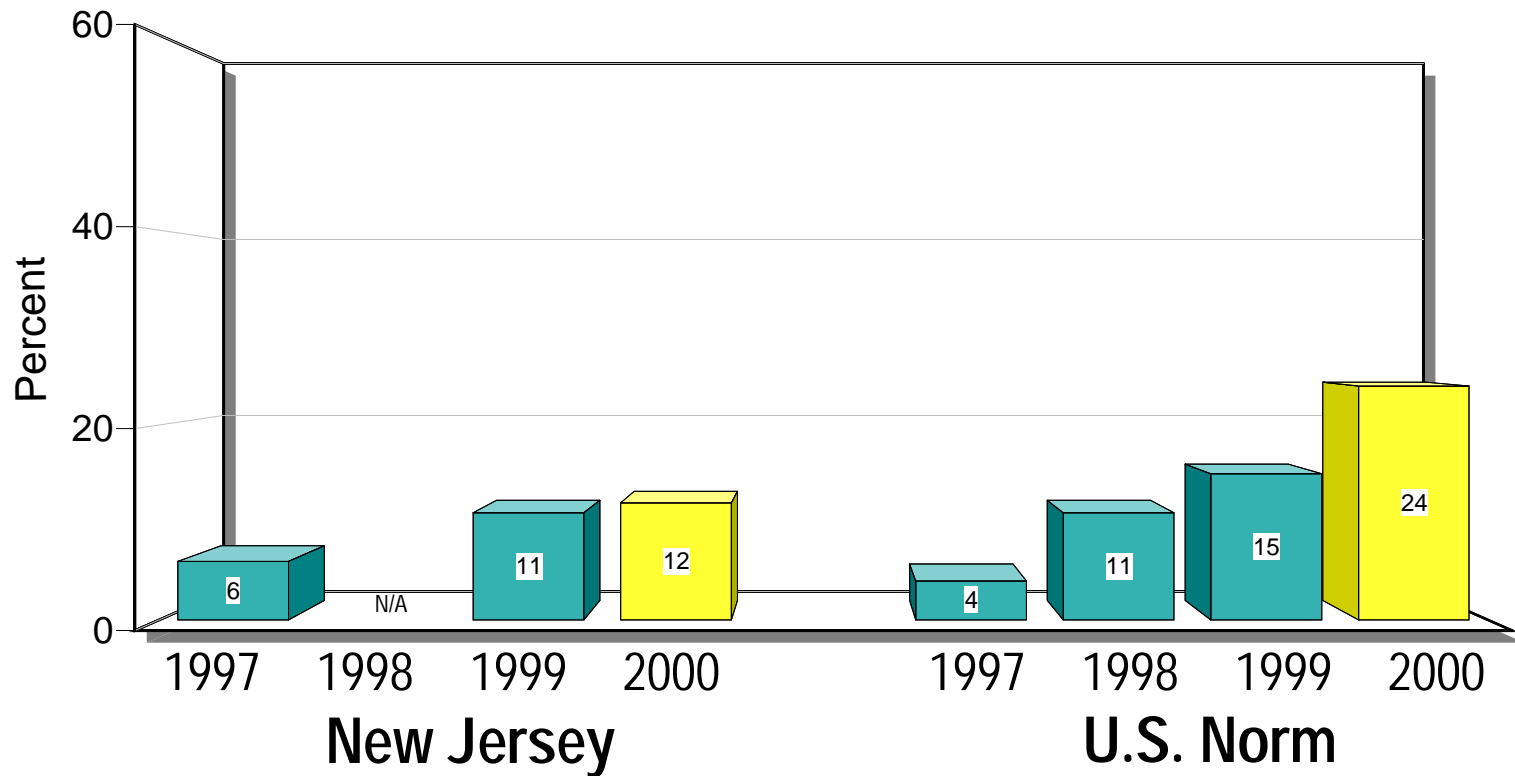
Base: Overnight Pleasure Trips



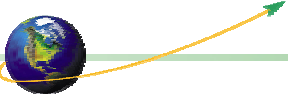
# Use of the Internet for Trip Planning



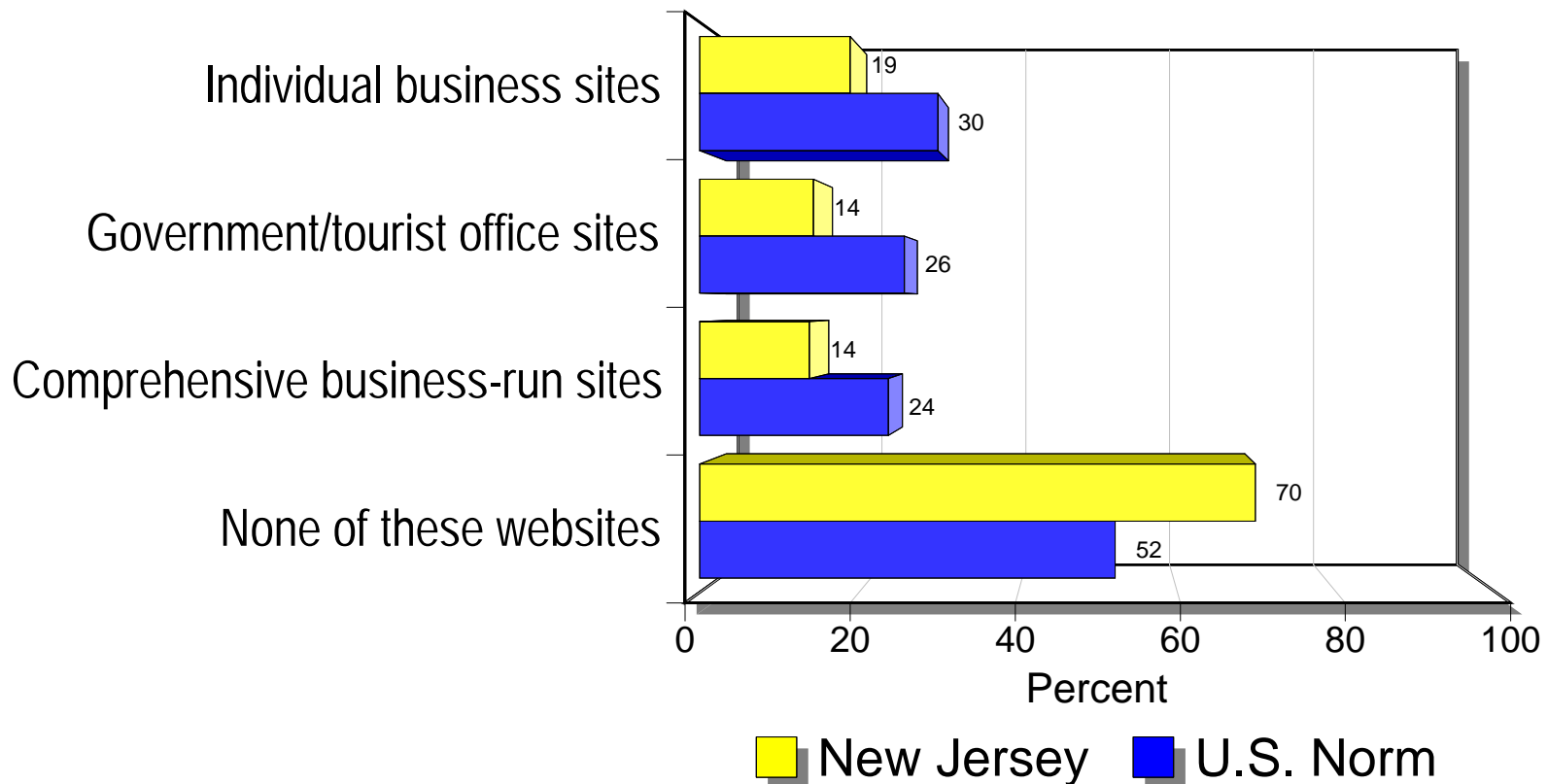
Base: Overnight Pleasure Trips



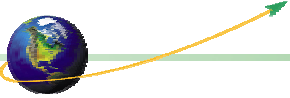
# Type of Websites Used for Trip Planning



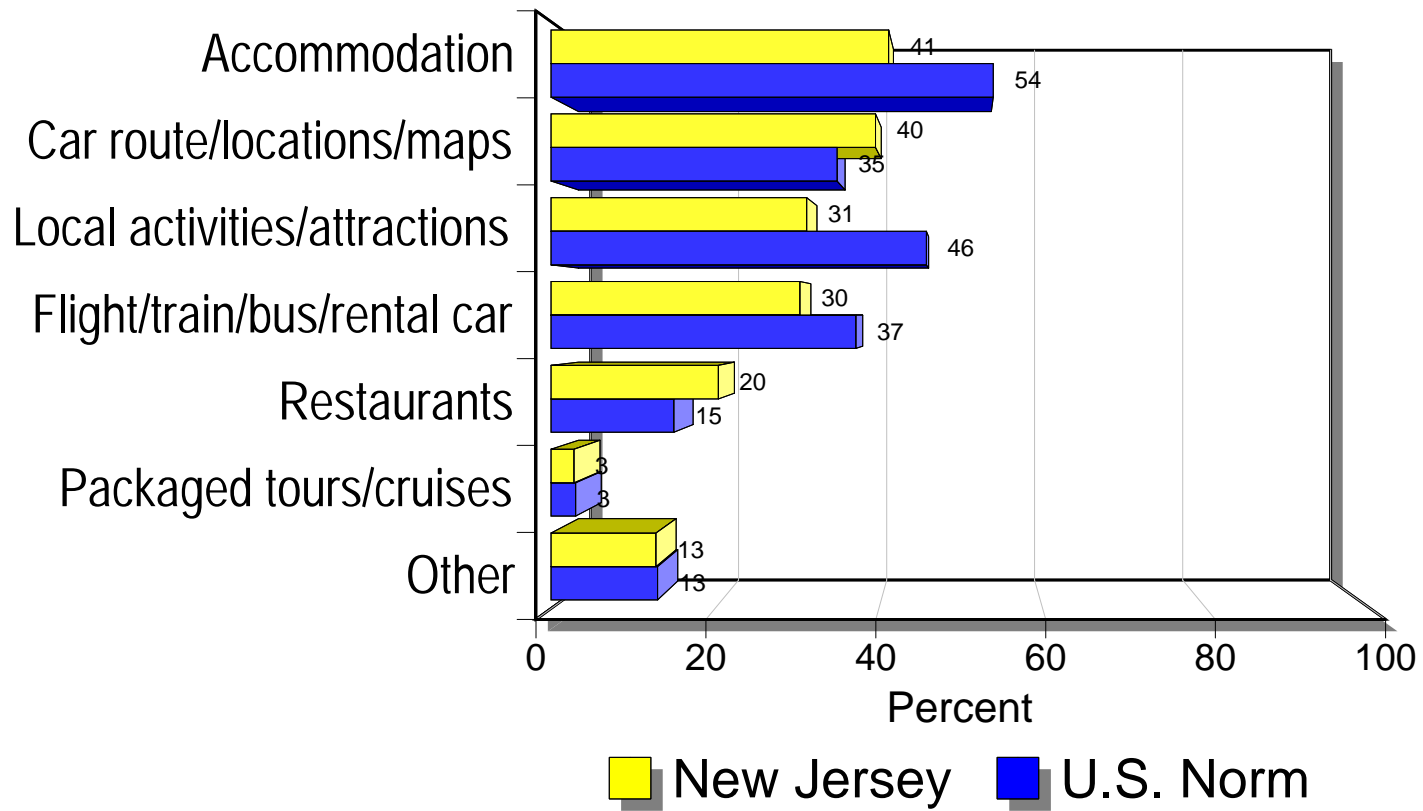
Base: Overnight Pleasure Trips by Those with Internet Access



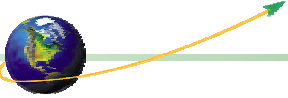
# Elements of Trip Planned Using Websites



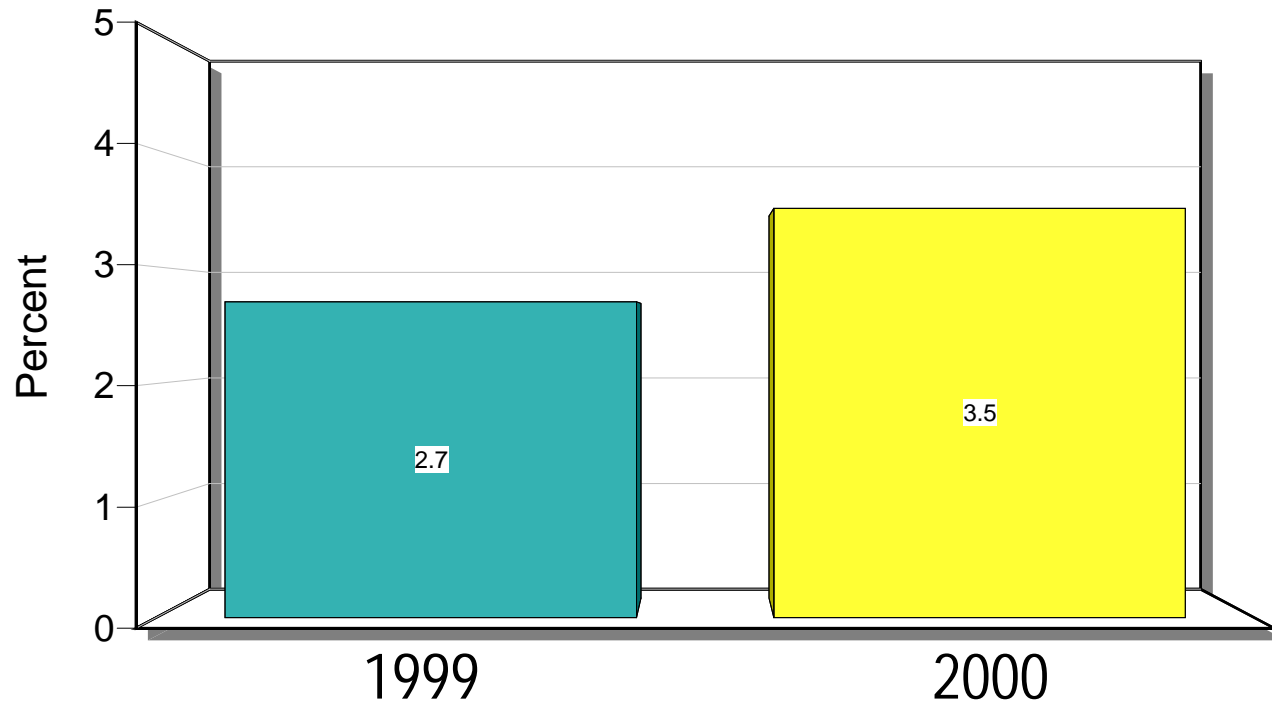
Base: Overnight Pleasure Trips by Those who Used a Website to Plan



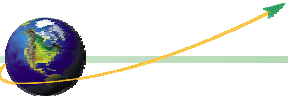
# Visited [www.visitnj.org](http://www.visitnj.org) Website When Planning Trip



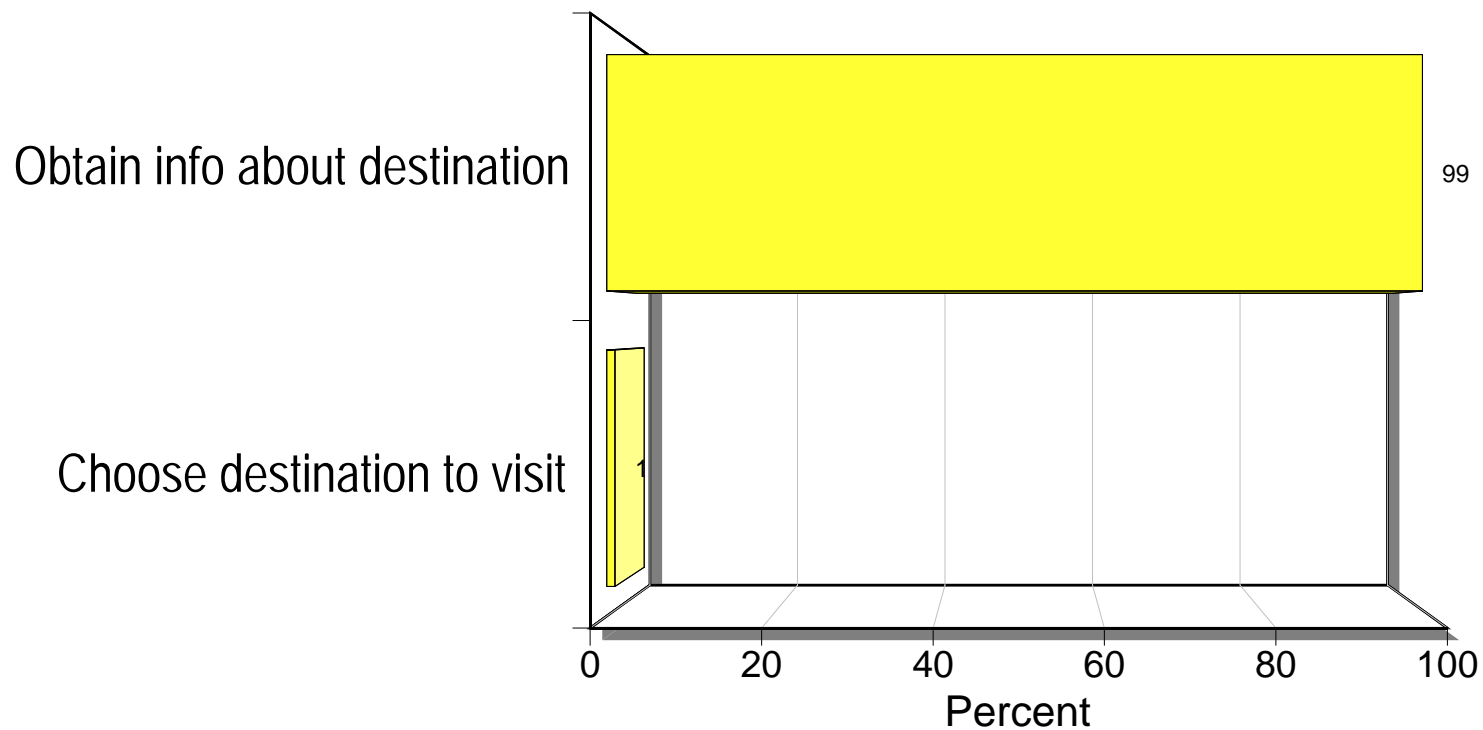
Base: Overnight Pleasure Trips



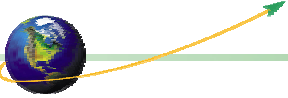
# Reason for Using [www.visitnj.org](http://www.visitnj.org)



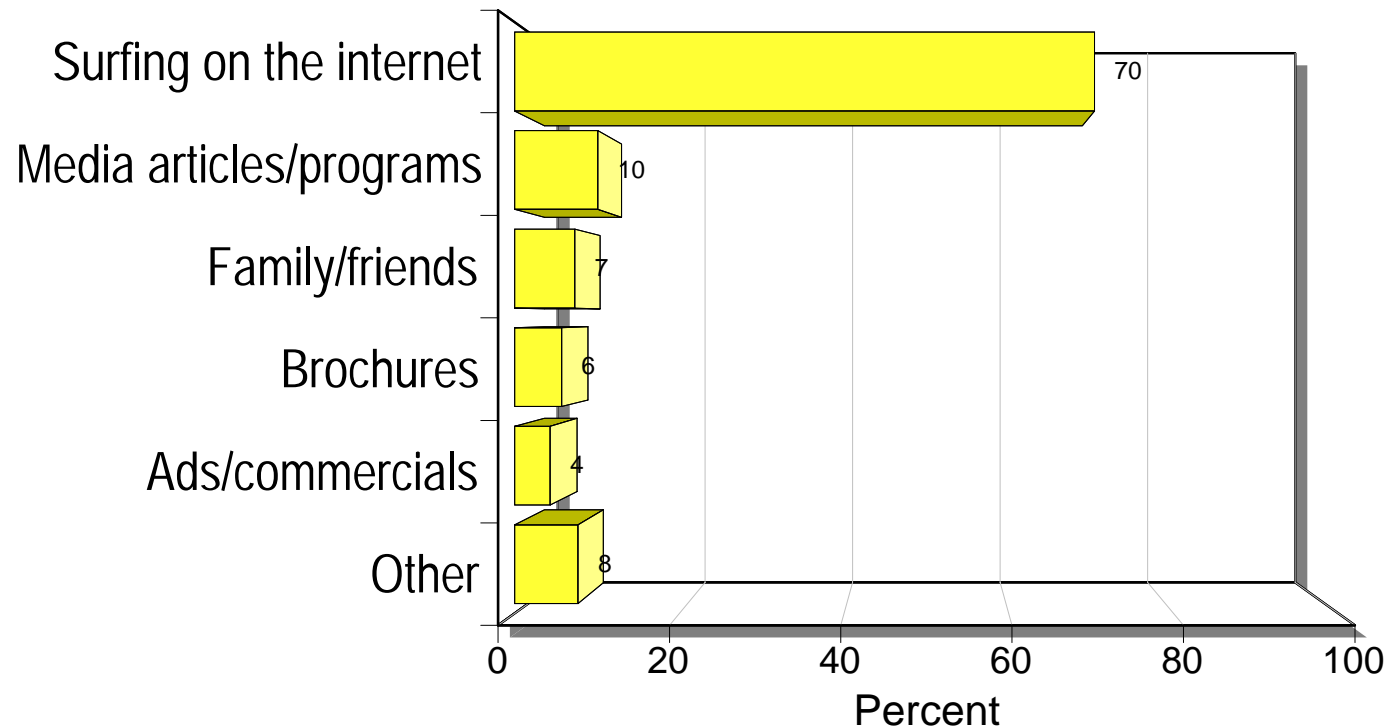
Base: Overnight Pleasure Trips by Those Who Visited [www.visitnj.org](http://www.visitnj.org)



# Source of Awareness of www.visitnj.org

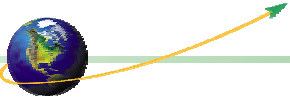


Base: Overnight Pleasure Trips by Those Who Visited www.visitnj.org

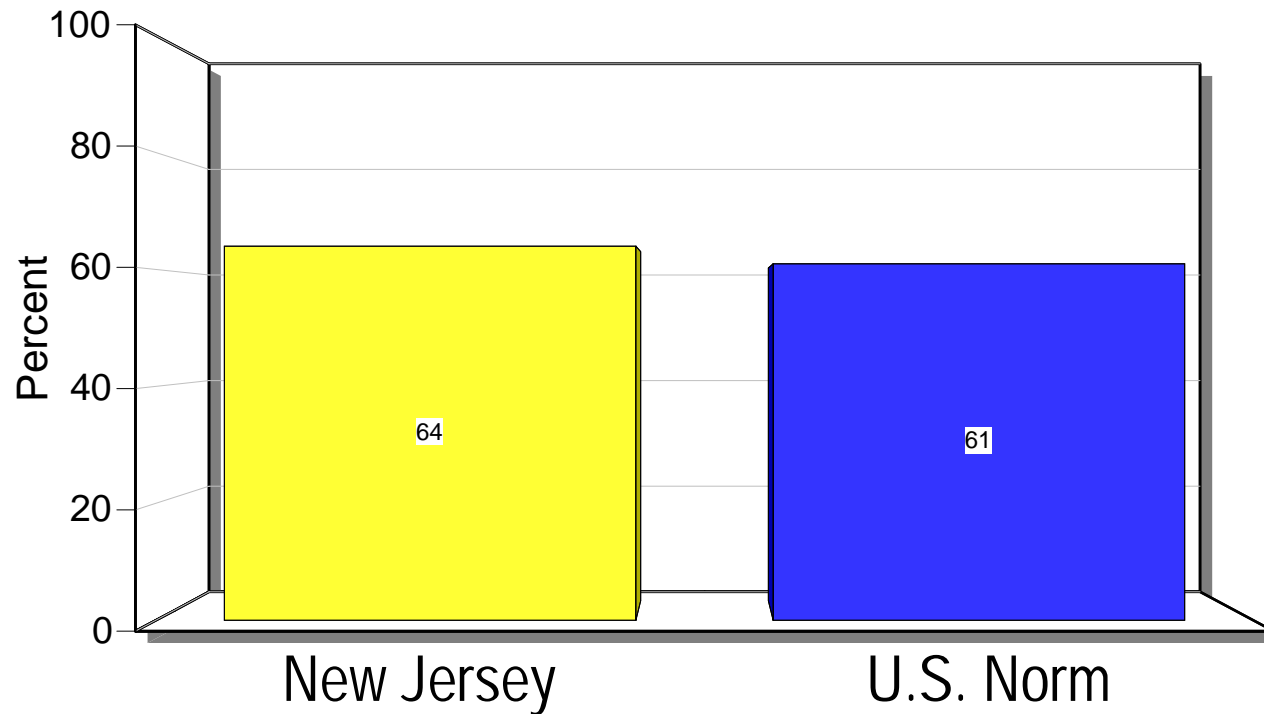




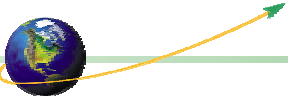
# Percent Who Booked In Advance



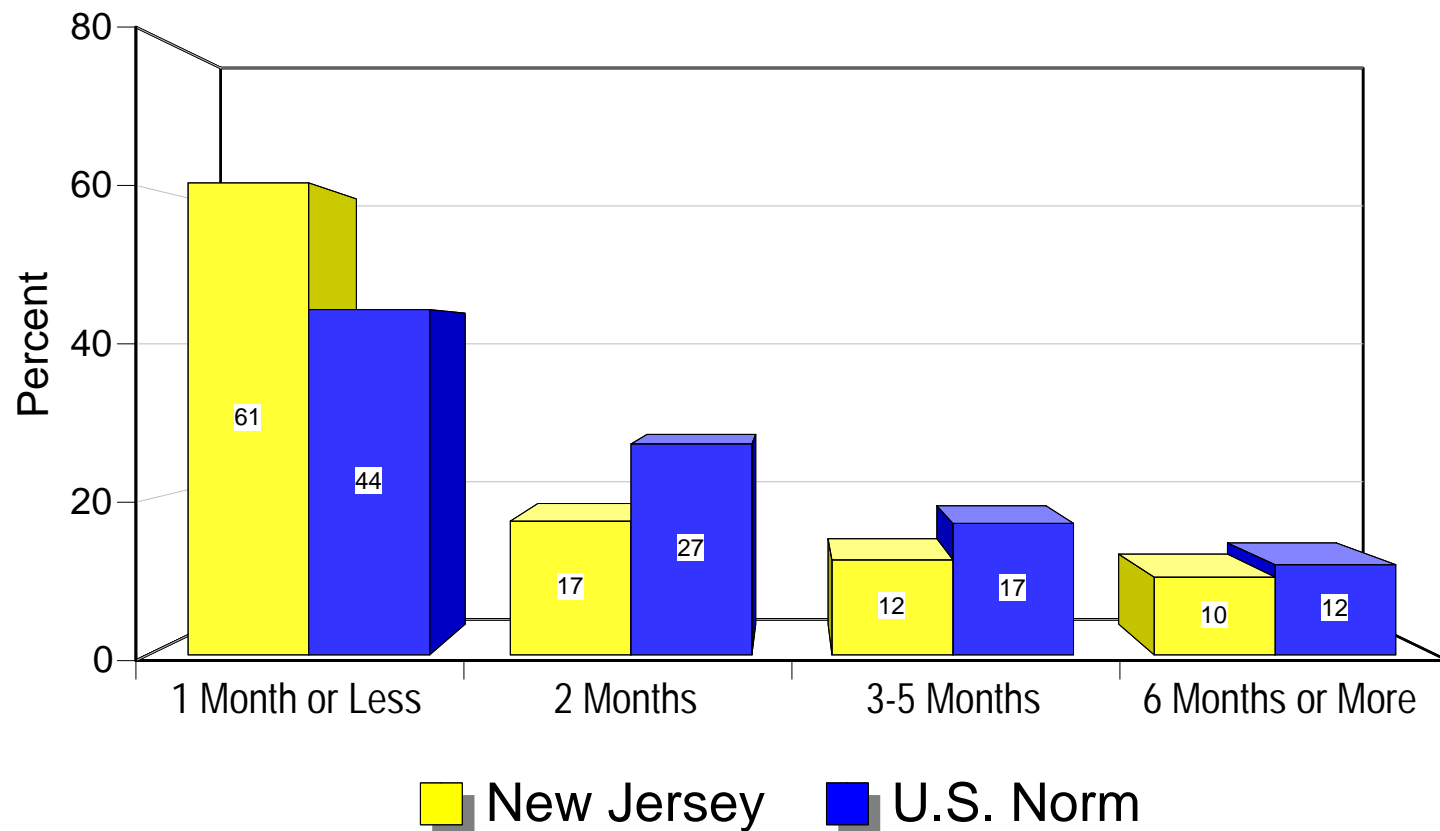
Base: Overnight Pleasure Trips



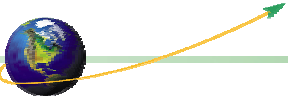
# Booking Cycle



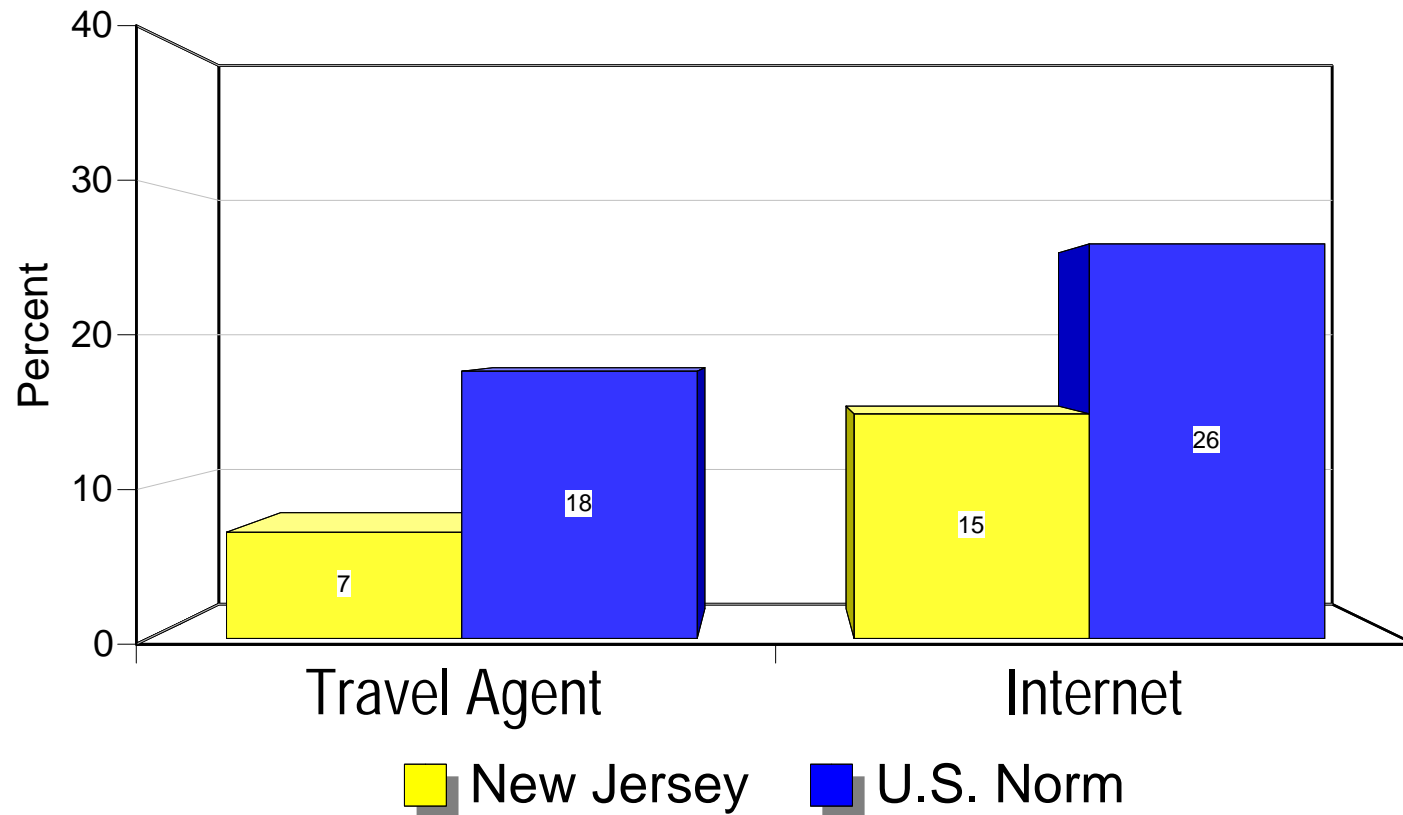
Base: Overnight Pleasure Trips Booked in Advance



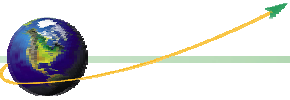
# Method of Booking



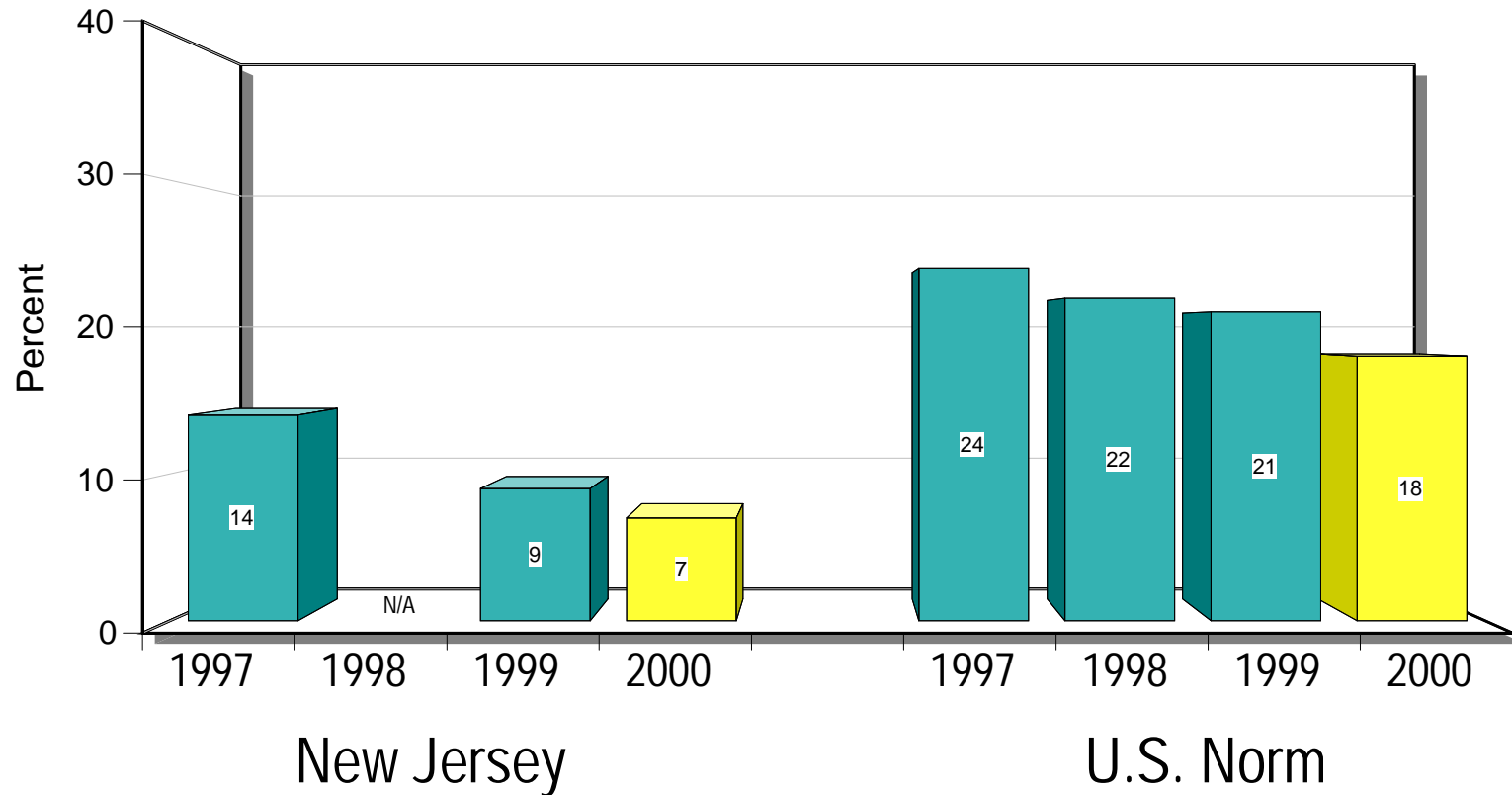
Base: Overnight Pleasure Trips Booked in Advance



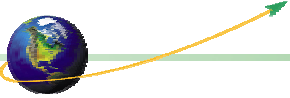
# Use of Travel Agent for Trip Booking



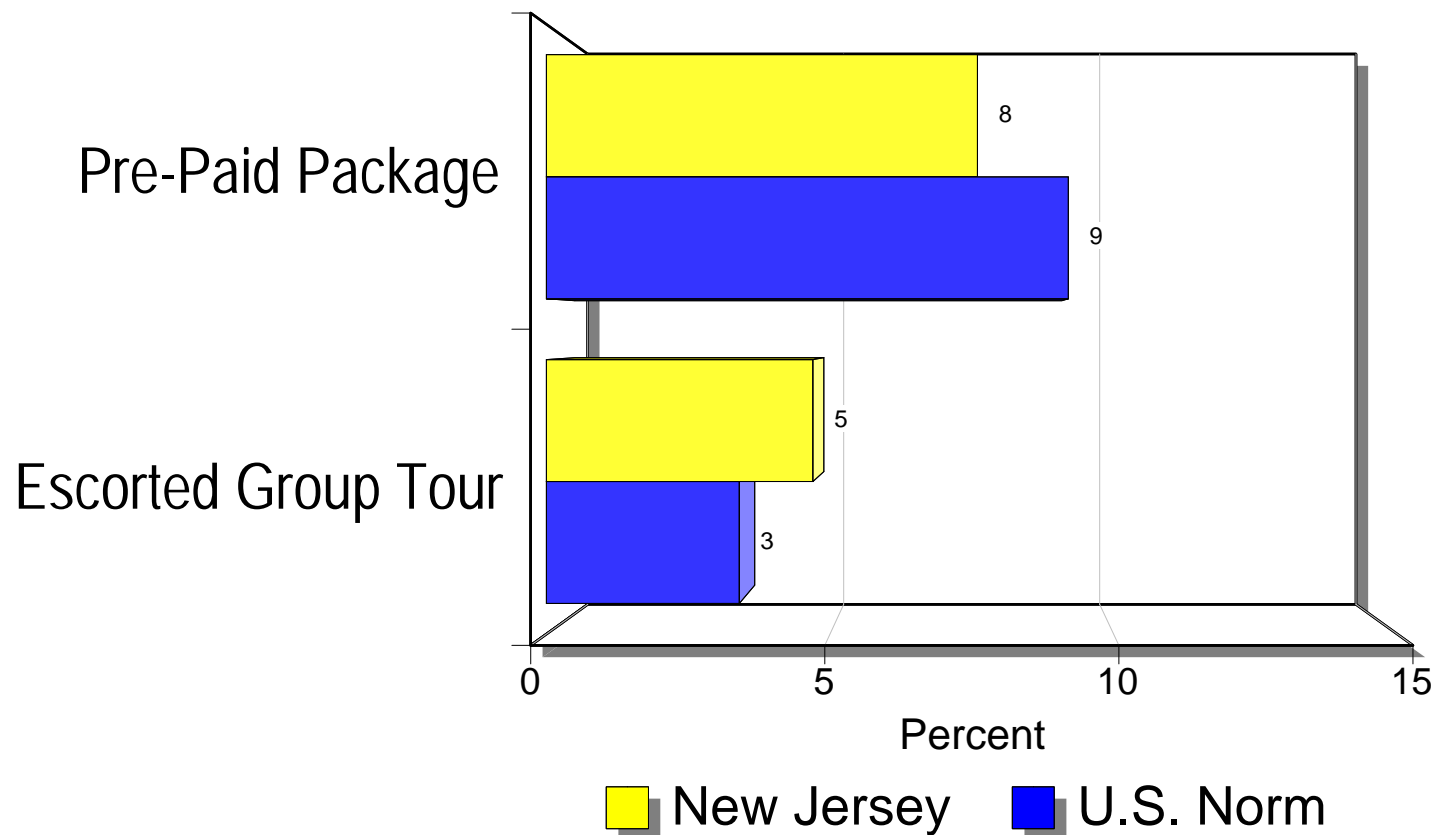
Base: Overnight Pleasure Trips Booked in Advance



# Use of Vacation Packages and Group Travel

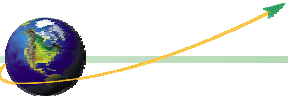


Base: Overnight Pleasure Trips

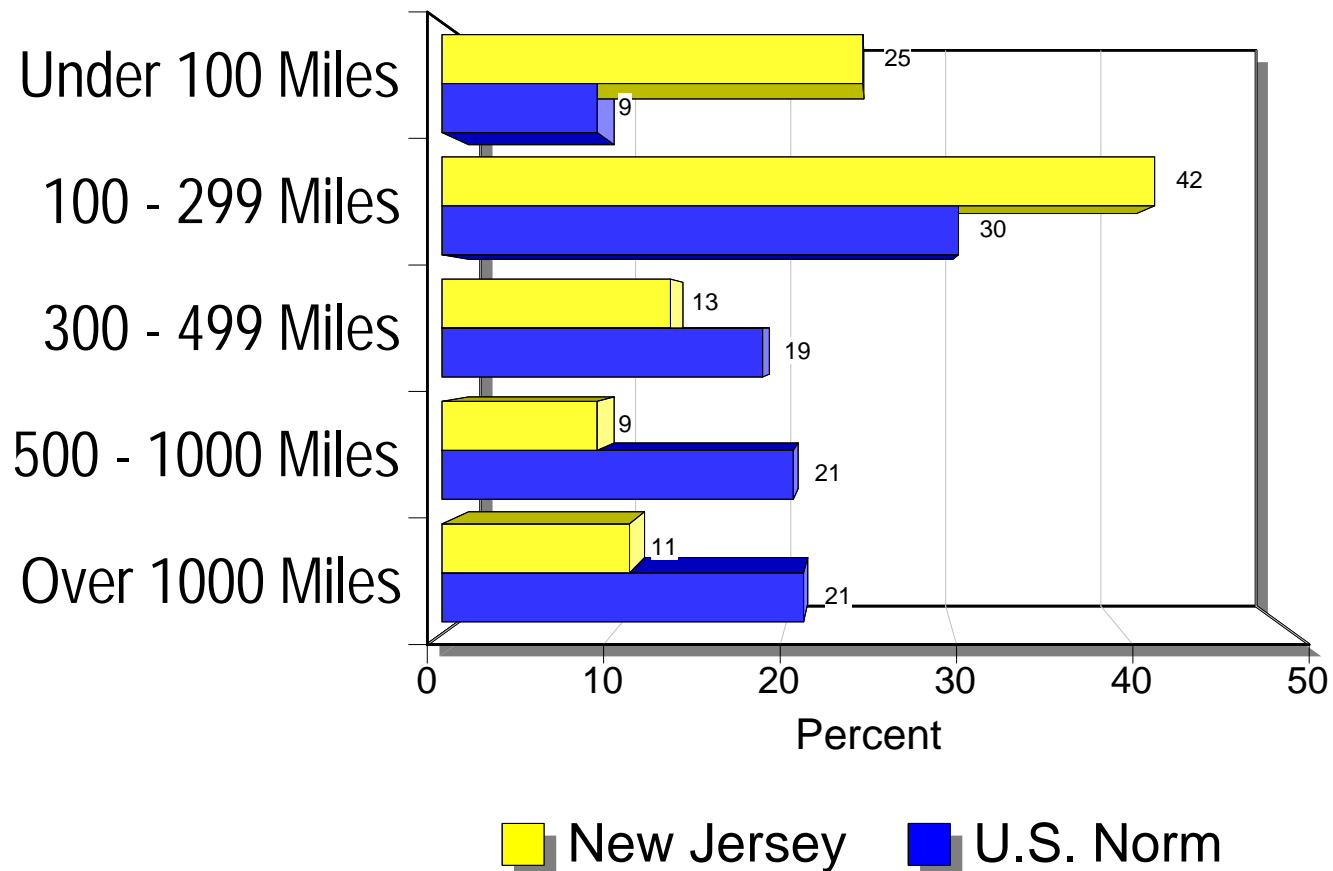


## Pleasure Trip Characteristics

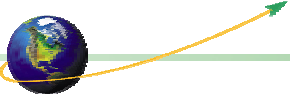
# Distance Traveled



Base: Overnight Pleasure Trips



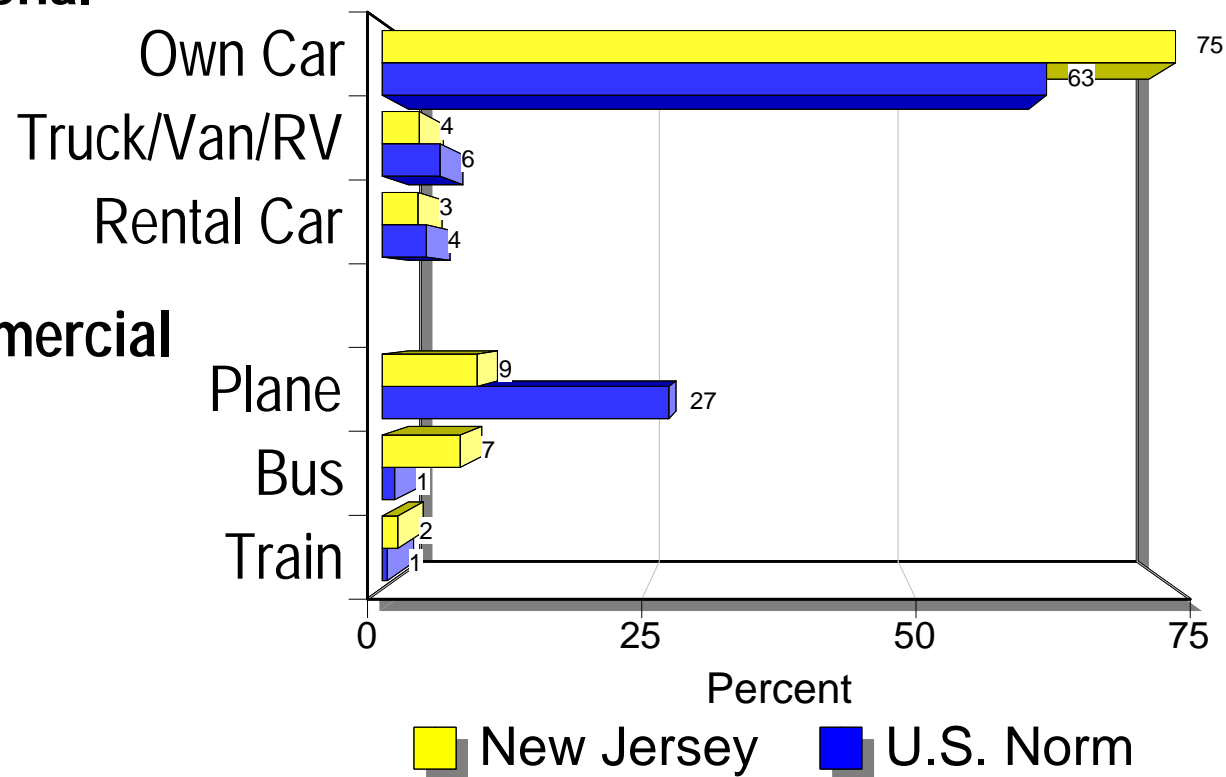
# Transportation Used to Enter New Jersey



Base: Overnight Pleasure Trips

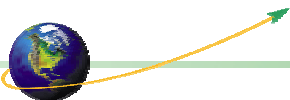
## Personal

## Commercial





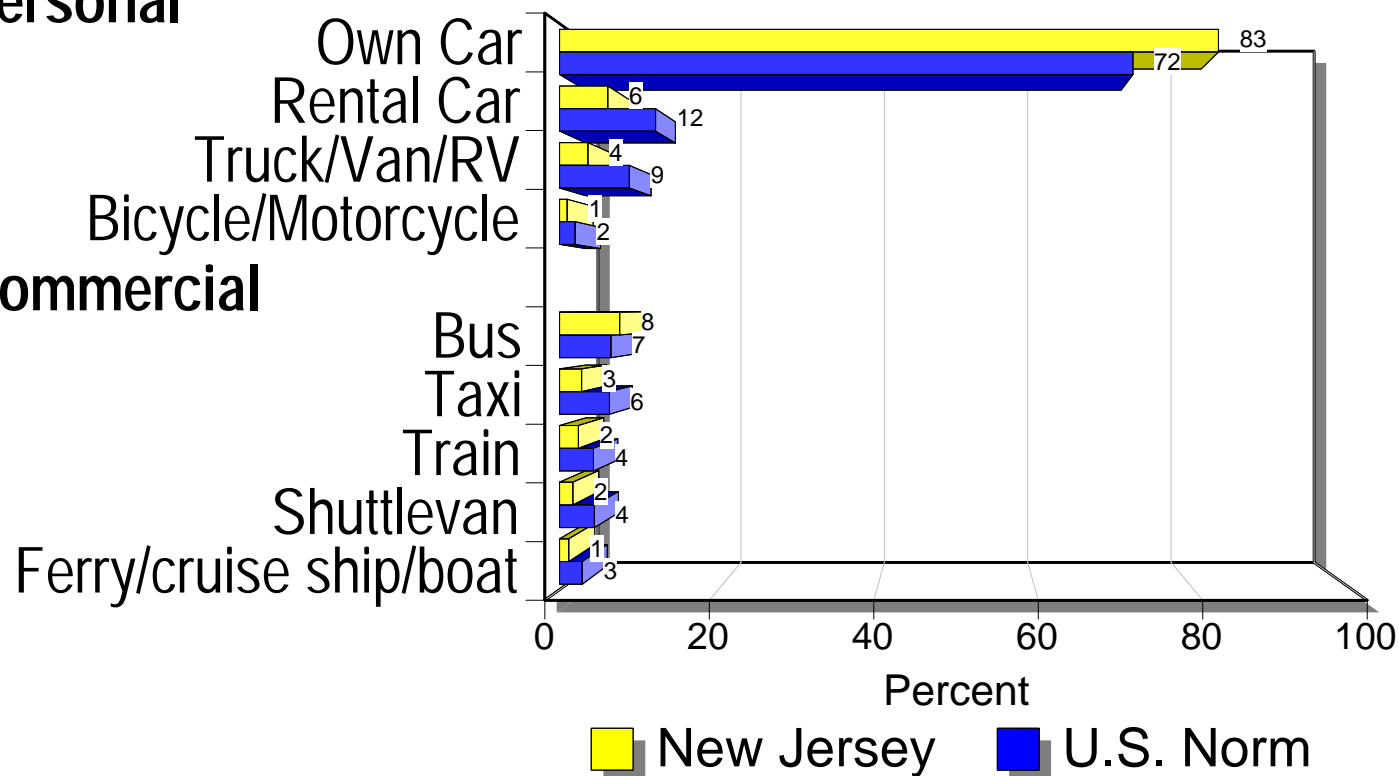
# Transportation Used Inside New Jersey



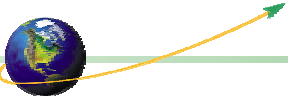
Base: Overnight Pleasure Trips

## Personal

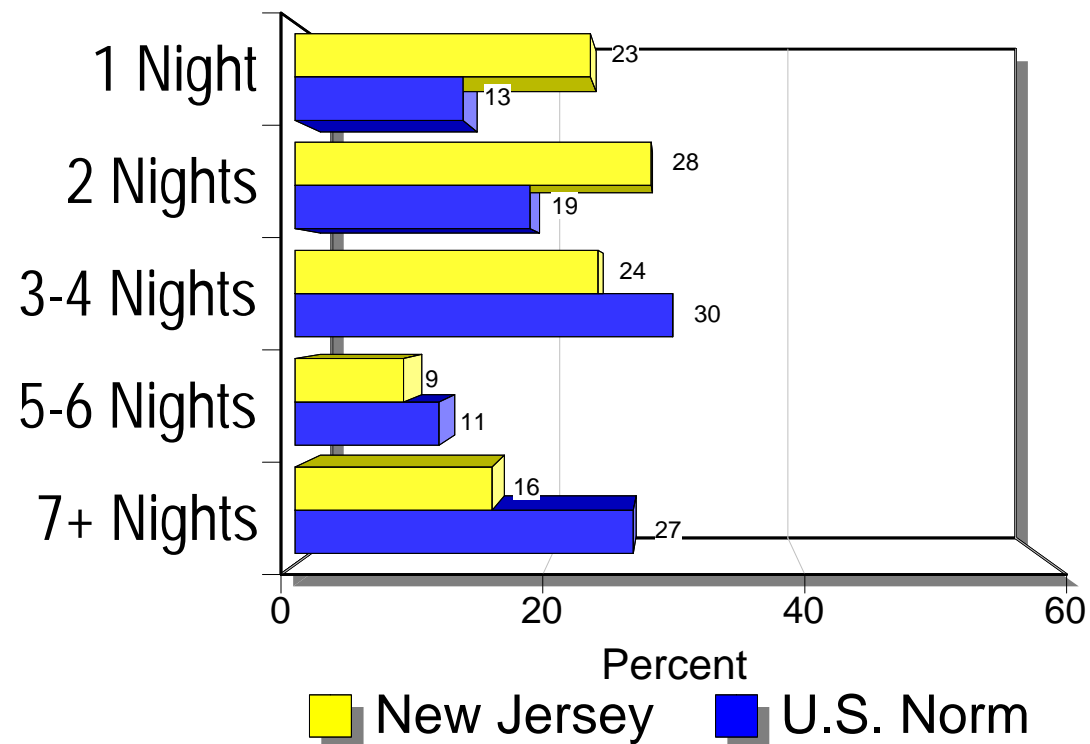
## Commercial



# Total Nights Away

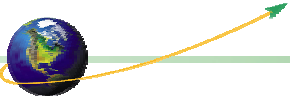


Base: Overnight Pleasure Trips

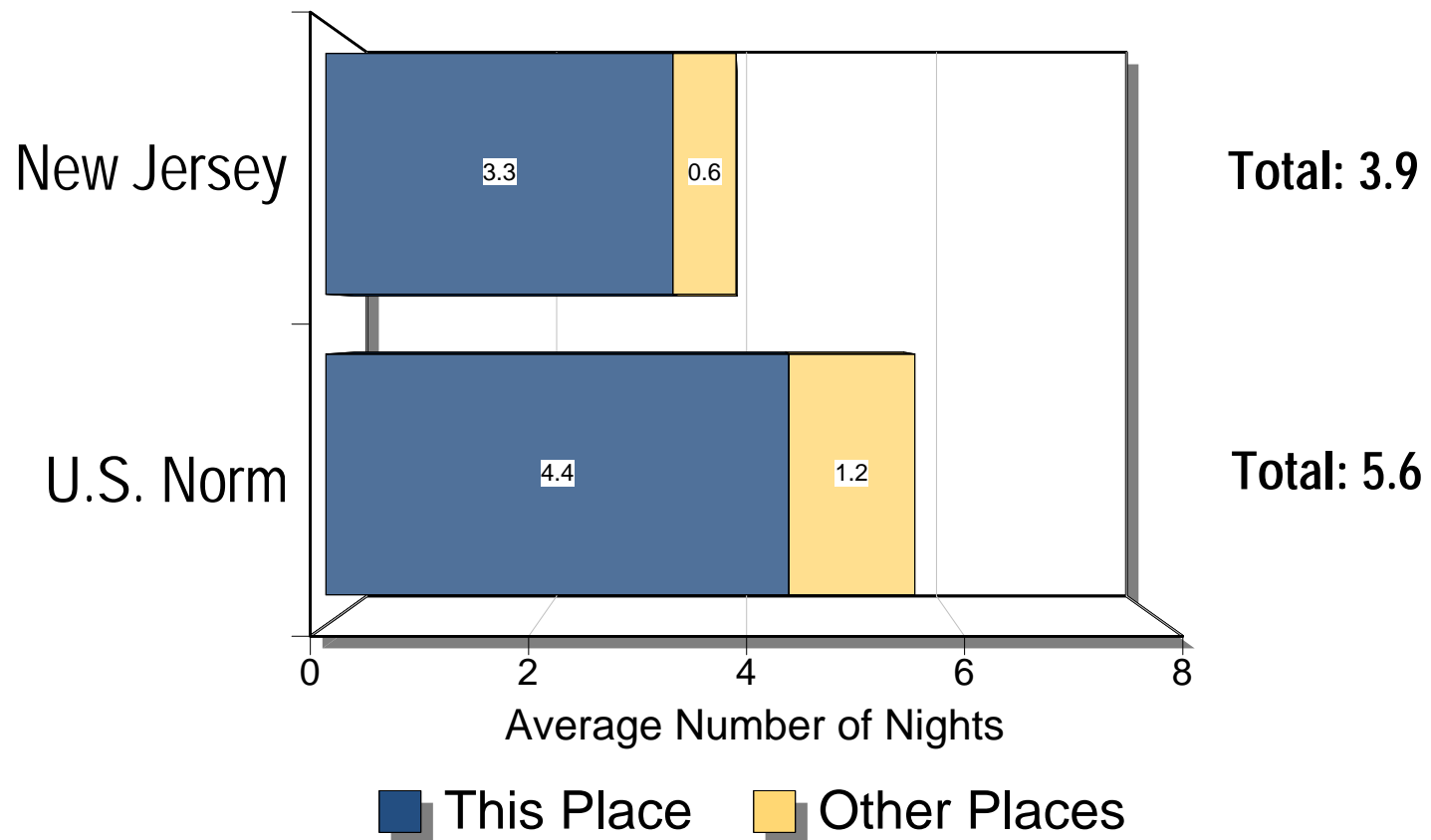


|                               | <u>New Jersey</u> | <u>U.S. Norm</u> |
|-------------------------------|-------------------|------------------|
| Average Number of Nights Away | 3.9               | 5.6              |

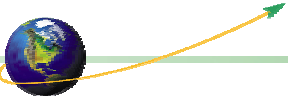
# Length of Stay



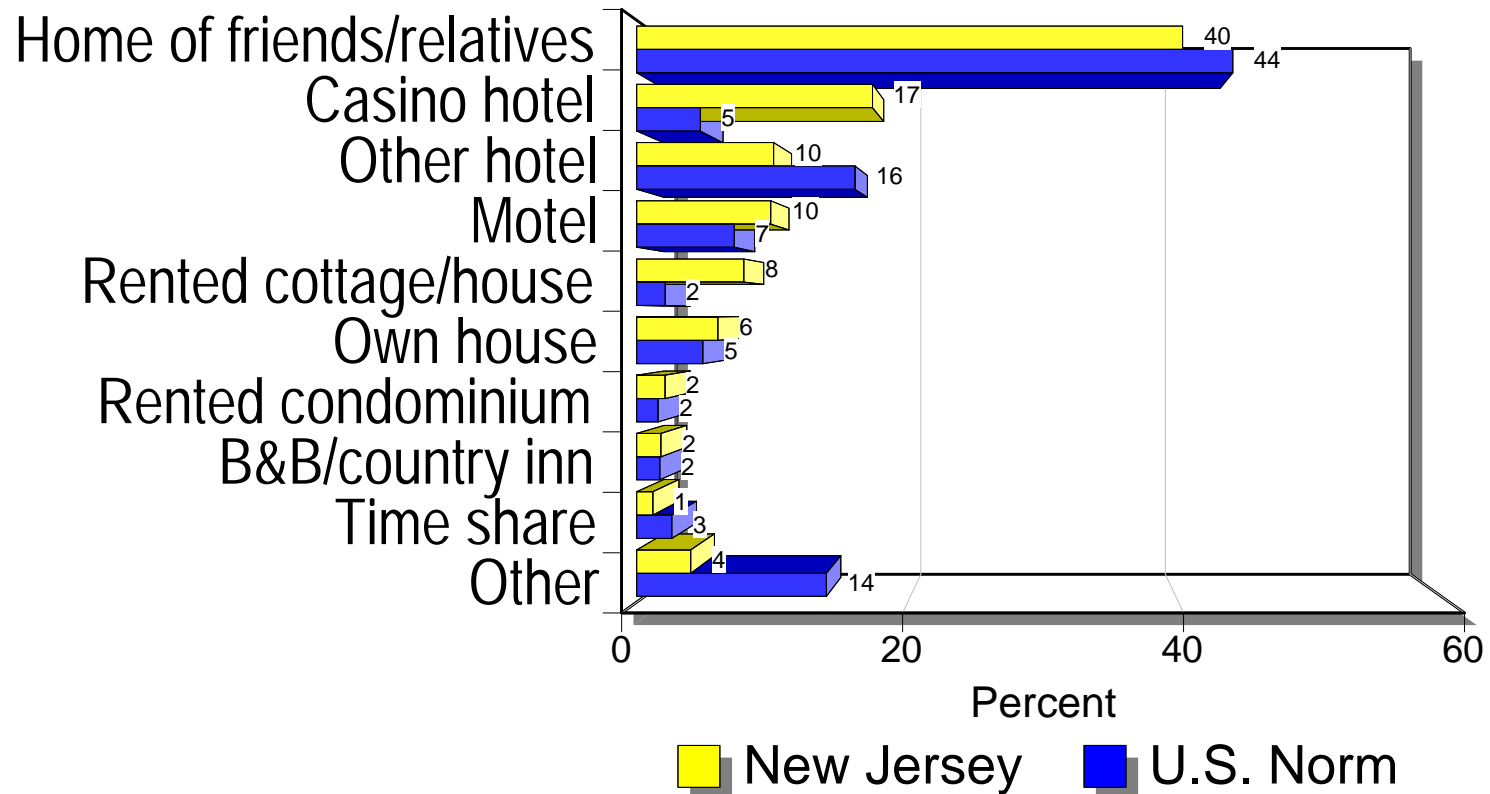
Base: Overnight Pleasure Trips



# Accommodations\* Used

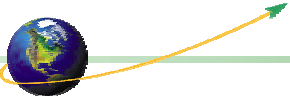


Base: Overnight Pleasure Trips

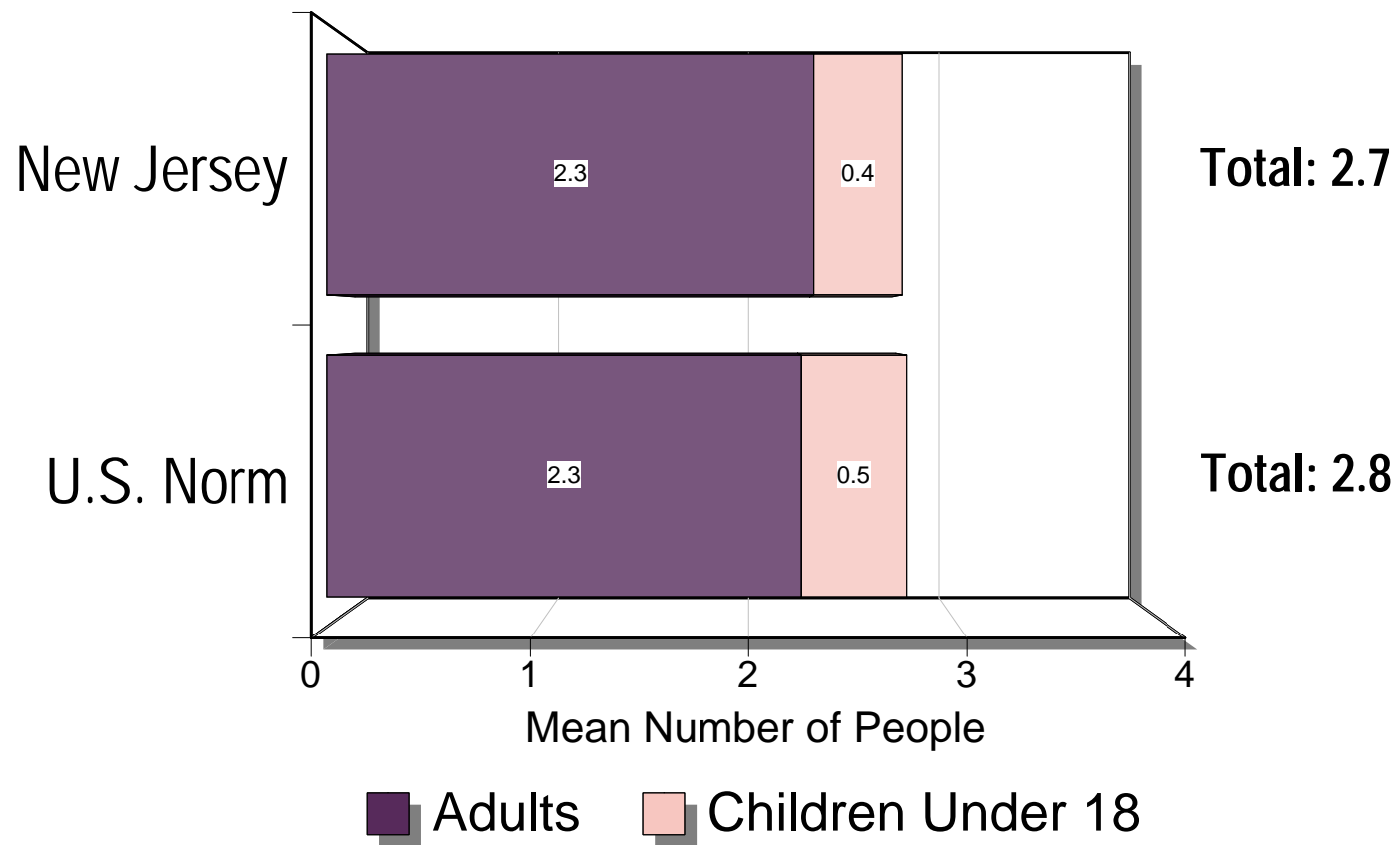


\* Percent of trip nights spent in each type of accommodation

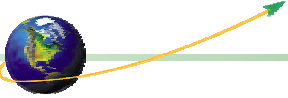
# Size of Travel Party



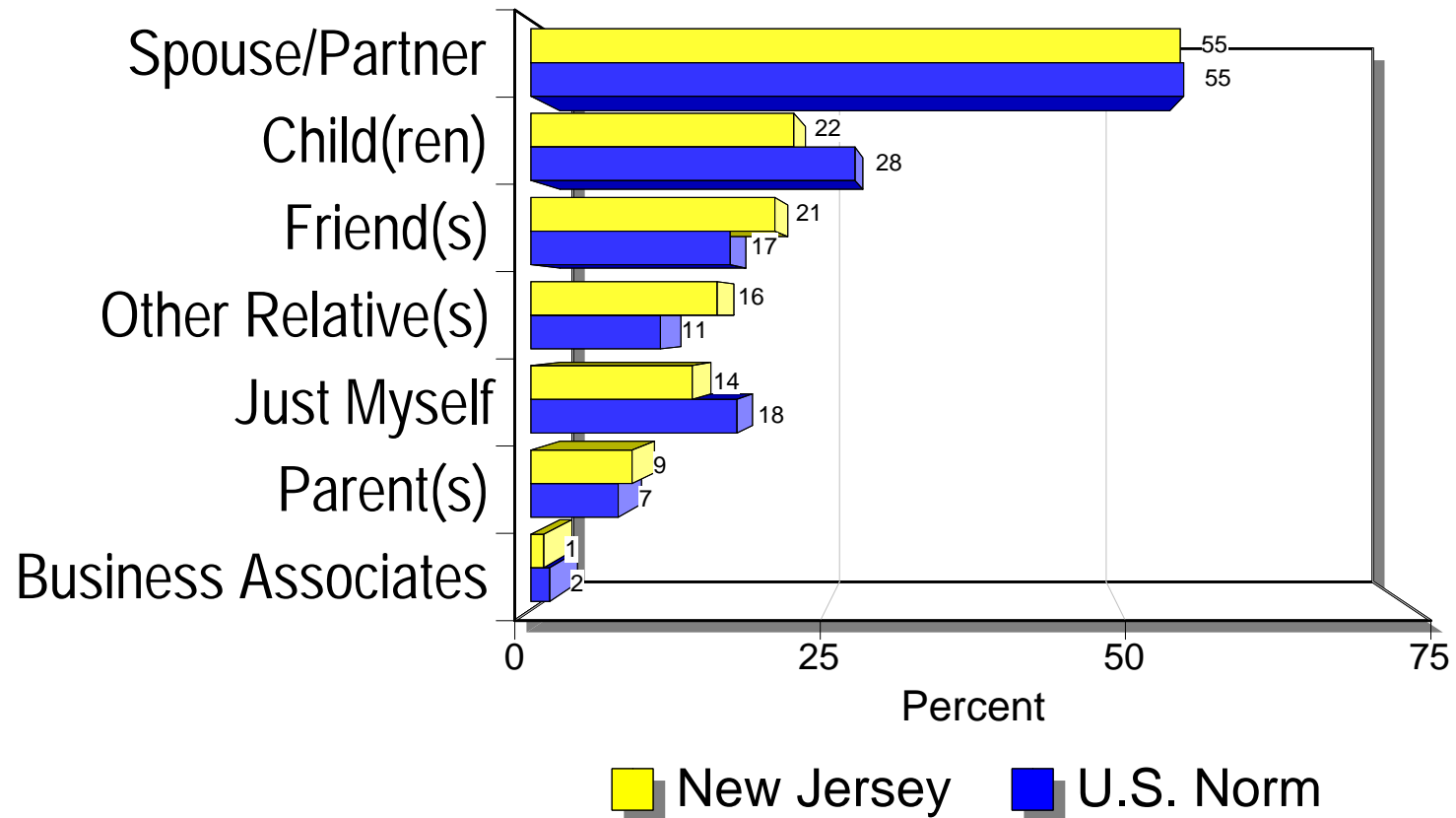
Base: Overnight Pleasure Trips



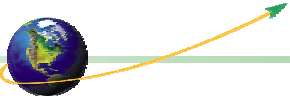
# Composition of Travel Party



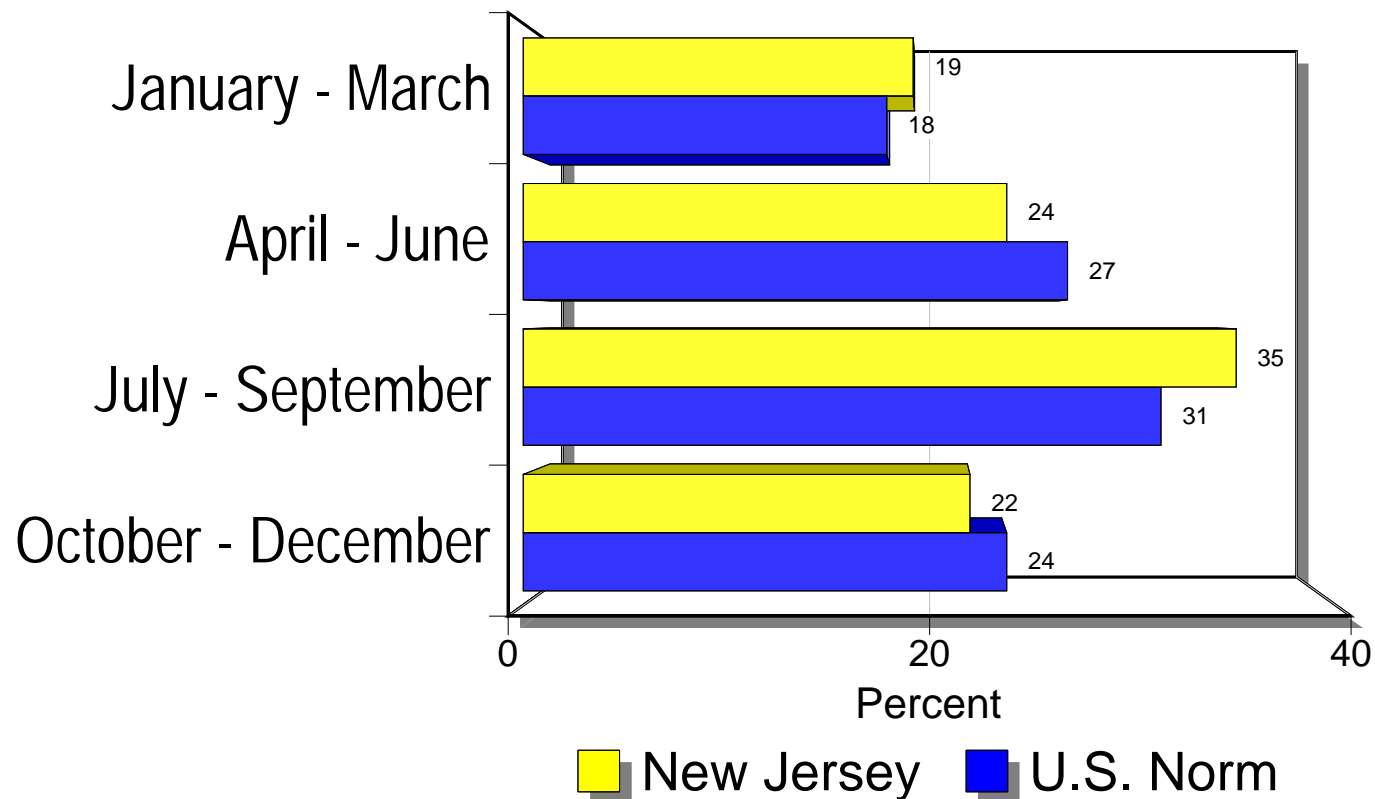
Base: Overnight Pleasure Trips



# Distribution of Trips By Quarter



Base: Overnight Pleasure Trips

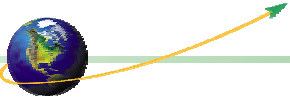




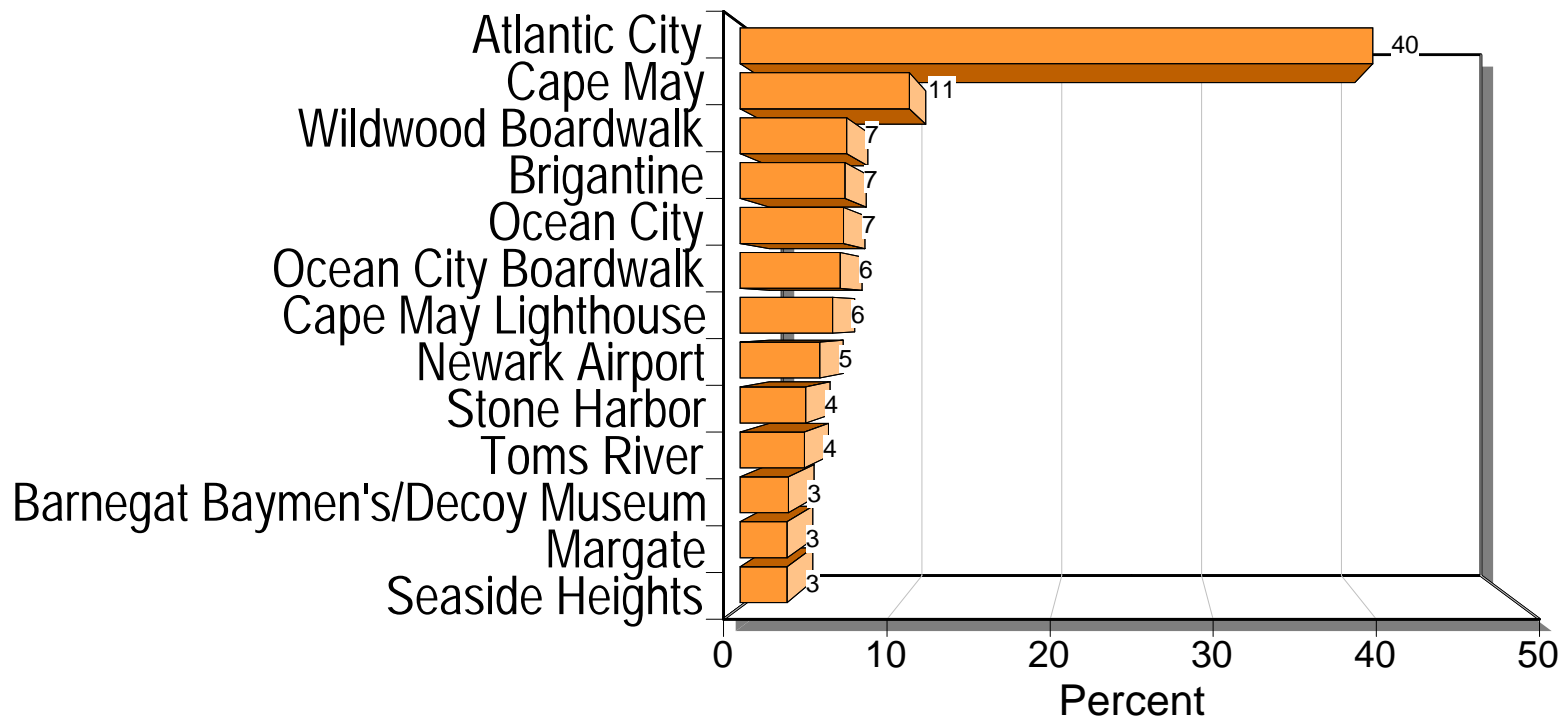
## Pleasure Trip Experiences



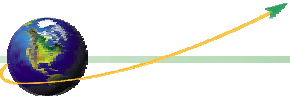
# Most Popular New Jersey Attractions



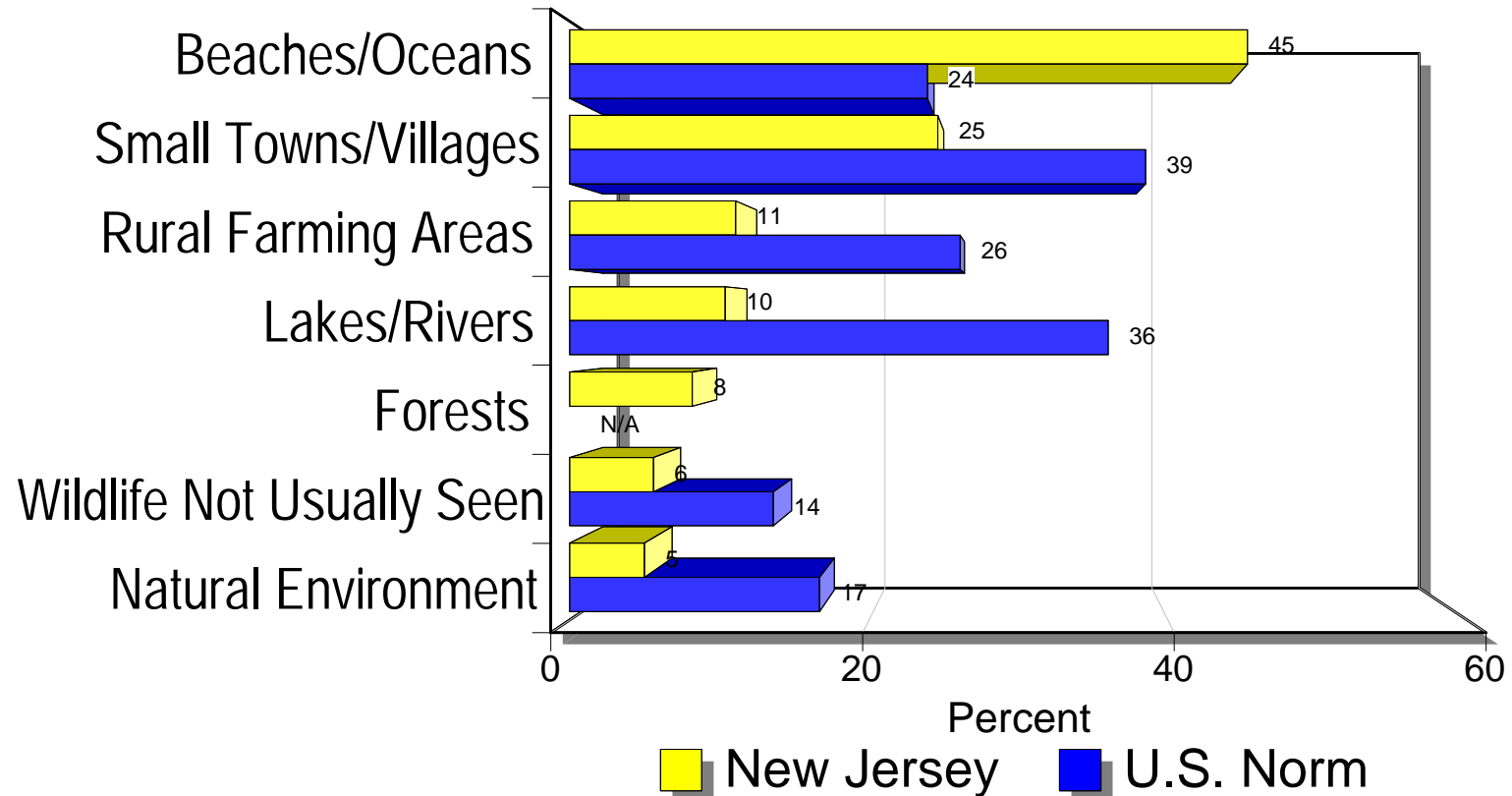
Base: Overnight Pleasure Trips



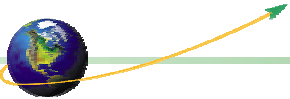
# Things Experienced on the Trip



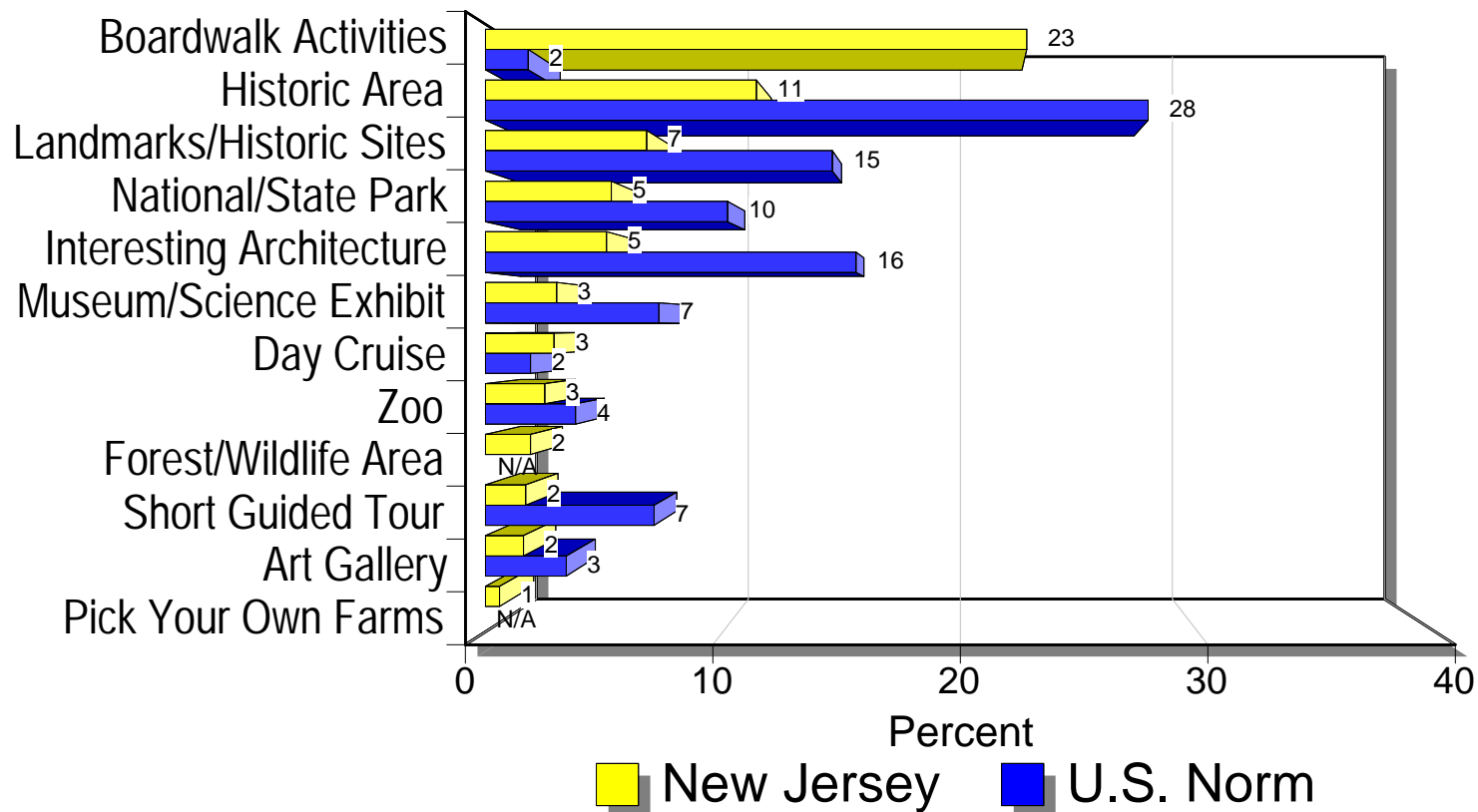
Base: Overnight Pleasure Trips



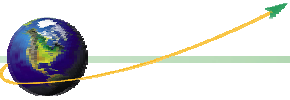
# Sightseeing



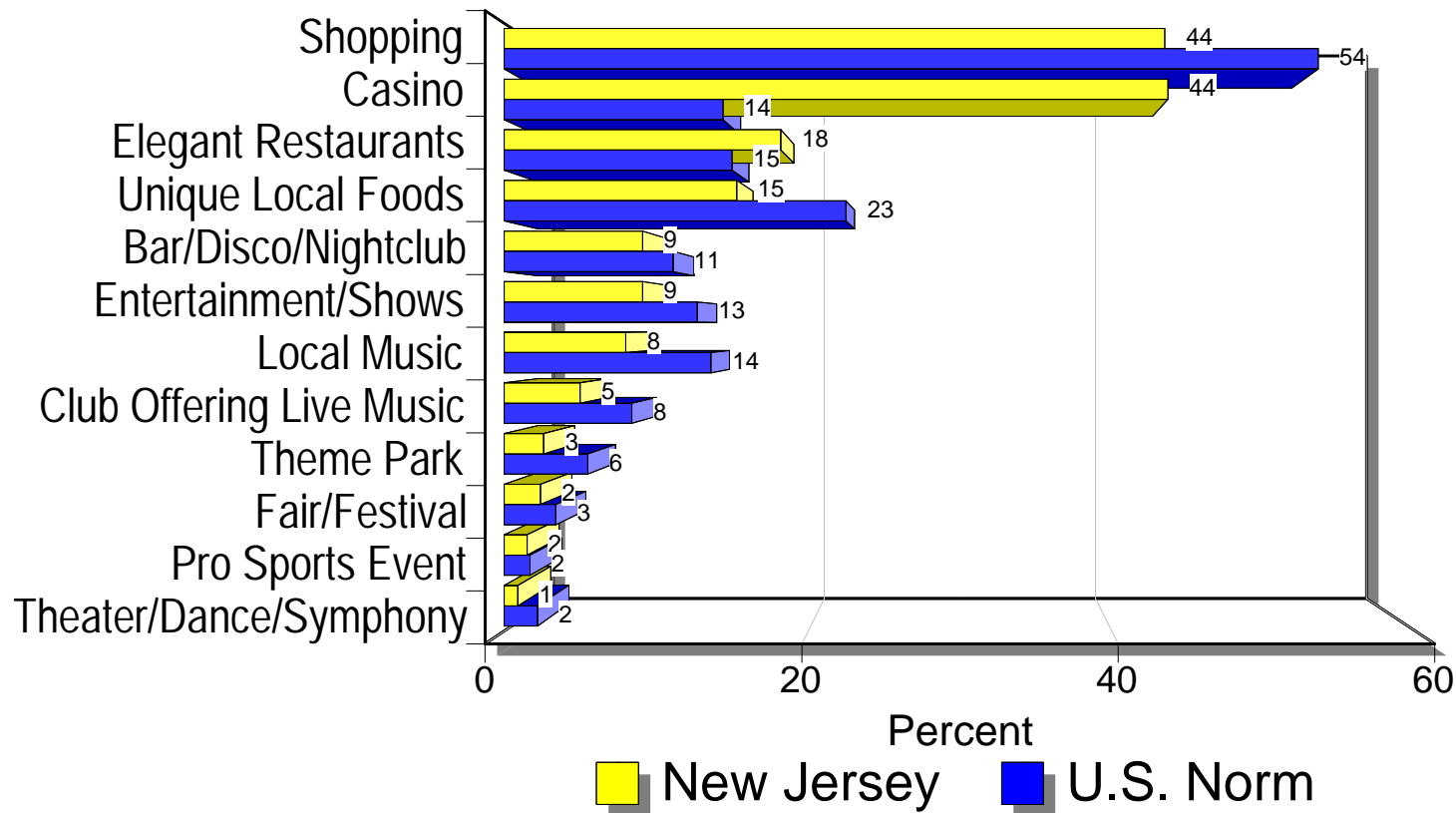
Base: Overnight Pleasure Trips



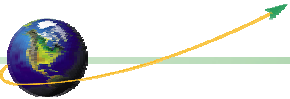
# Entertainment



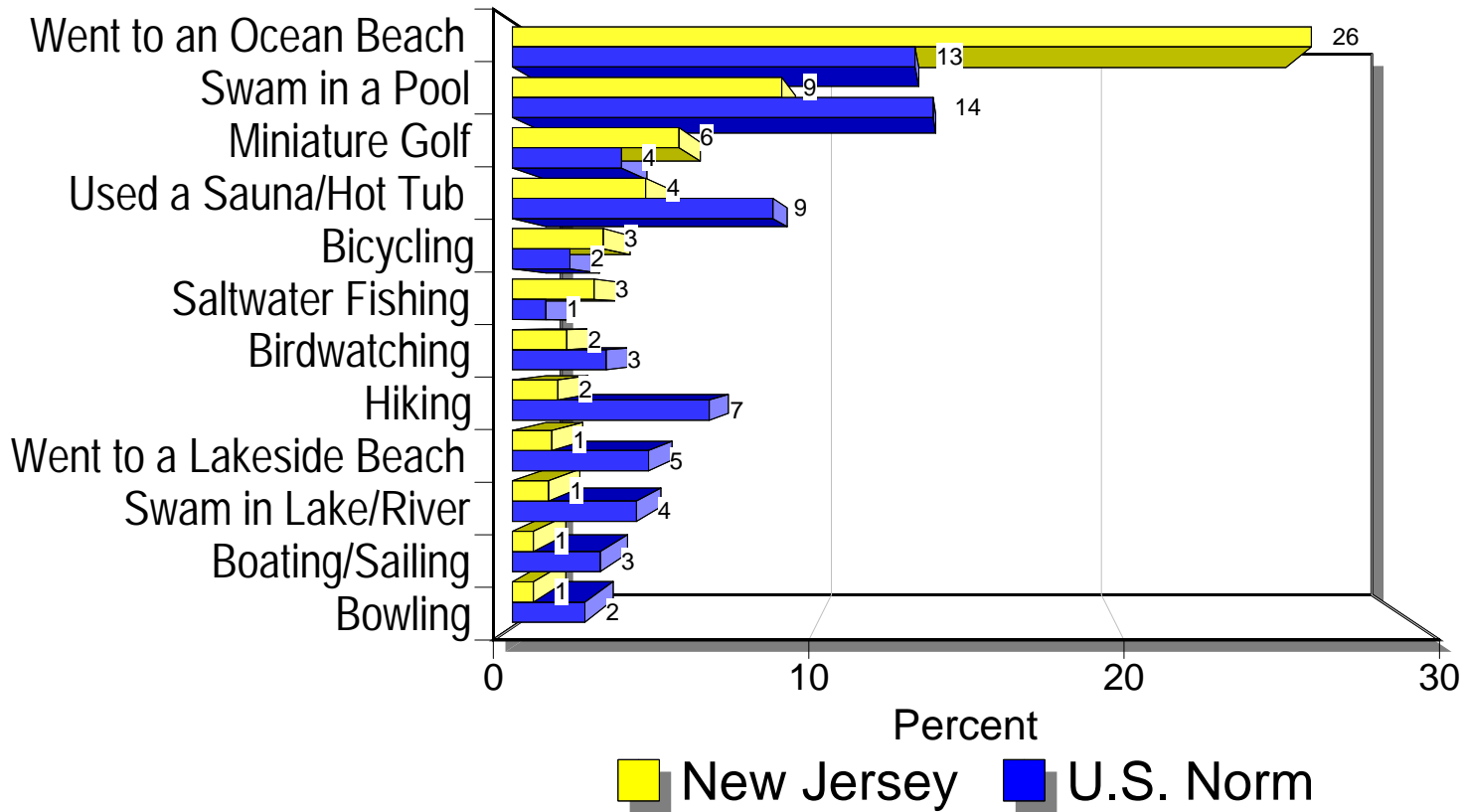
Base: Overnight Pleasure Trips



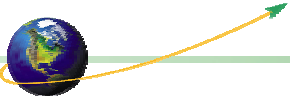
# Sports & Recreation



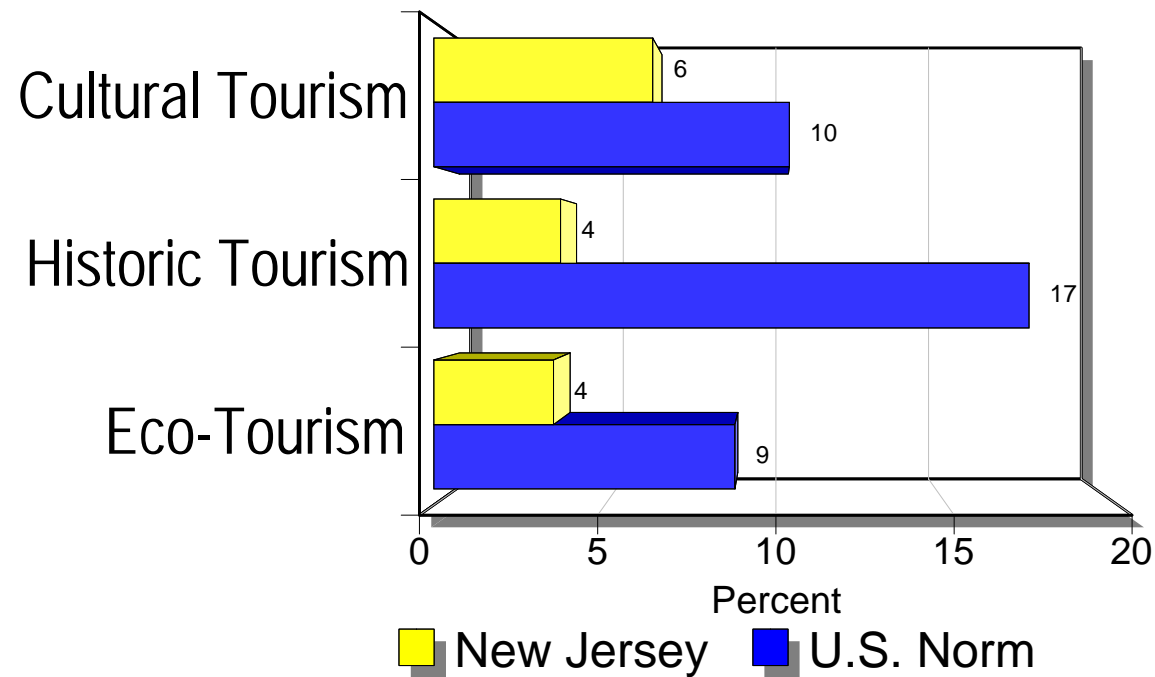
Base: Overnight Pleasure Trips



# Cultural, Historic, and Eco-Tourism\*

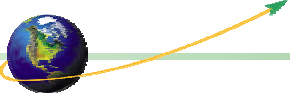


Base: Overnight Pleasure Trips

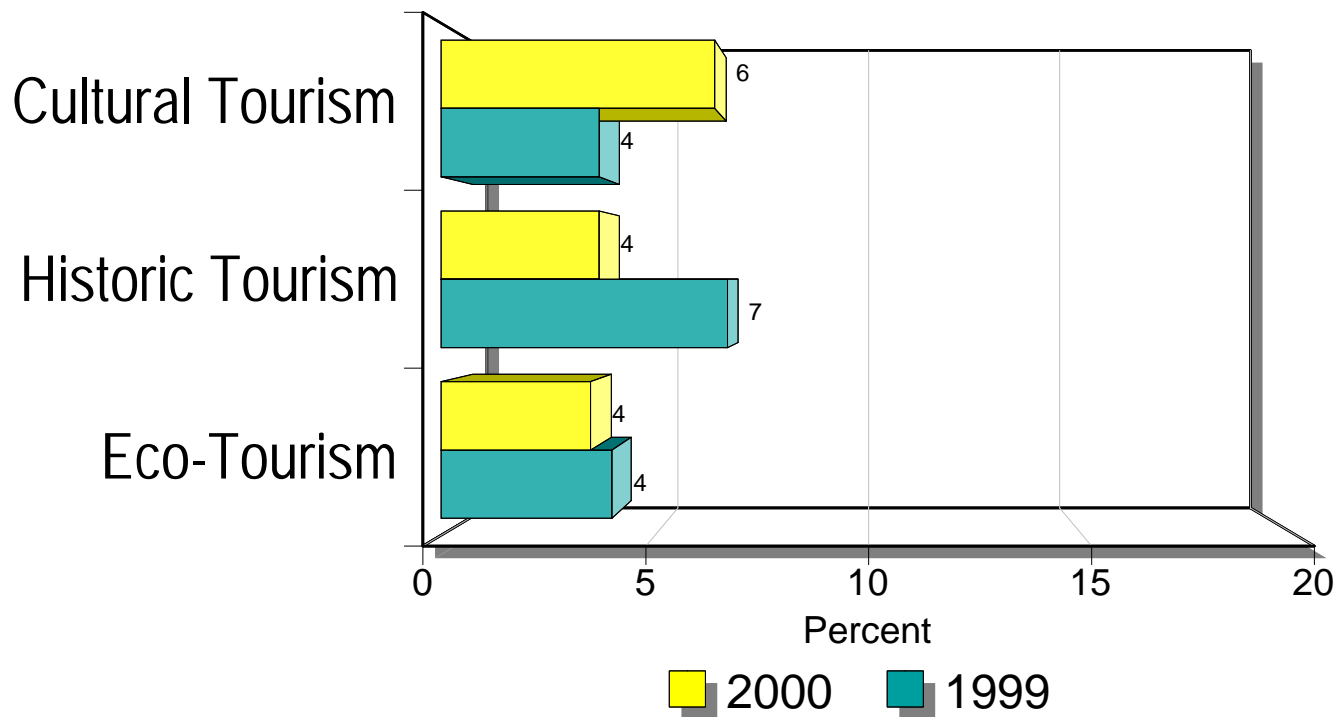


\* Percent who said cultural, historic or eco-tourism was of particular interest

# Cultural, Historic, and Eco-Tourism\* to New Jersey — 1999 vs. 2000



Base: Overnight Pleasure Trips



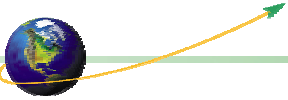
\*Percent who said cultural, historic or eco tourism was of particular interest

Travel Profile:

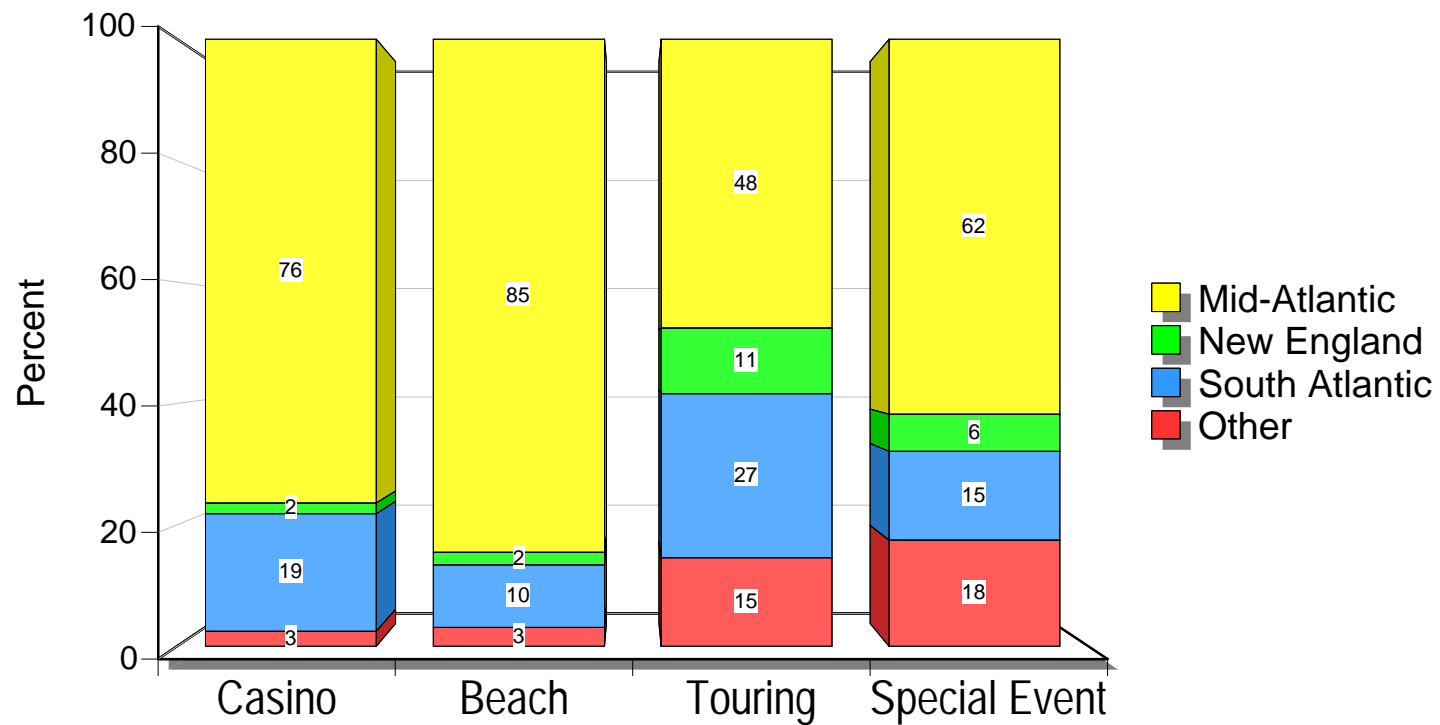
*Casino, Beach, Touring  
and Special Event Trips*



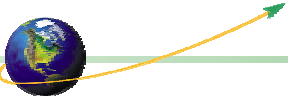
# Sources of Business



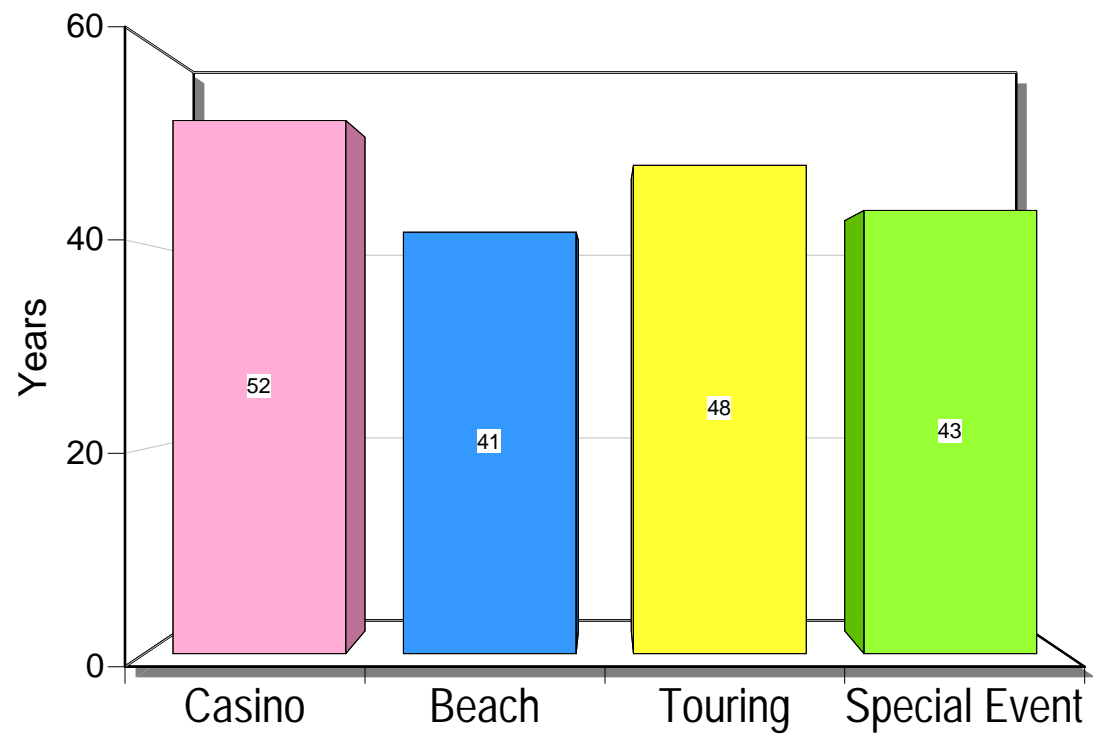
Base: Overnight Trips



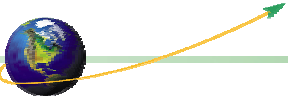
# Average Age



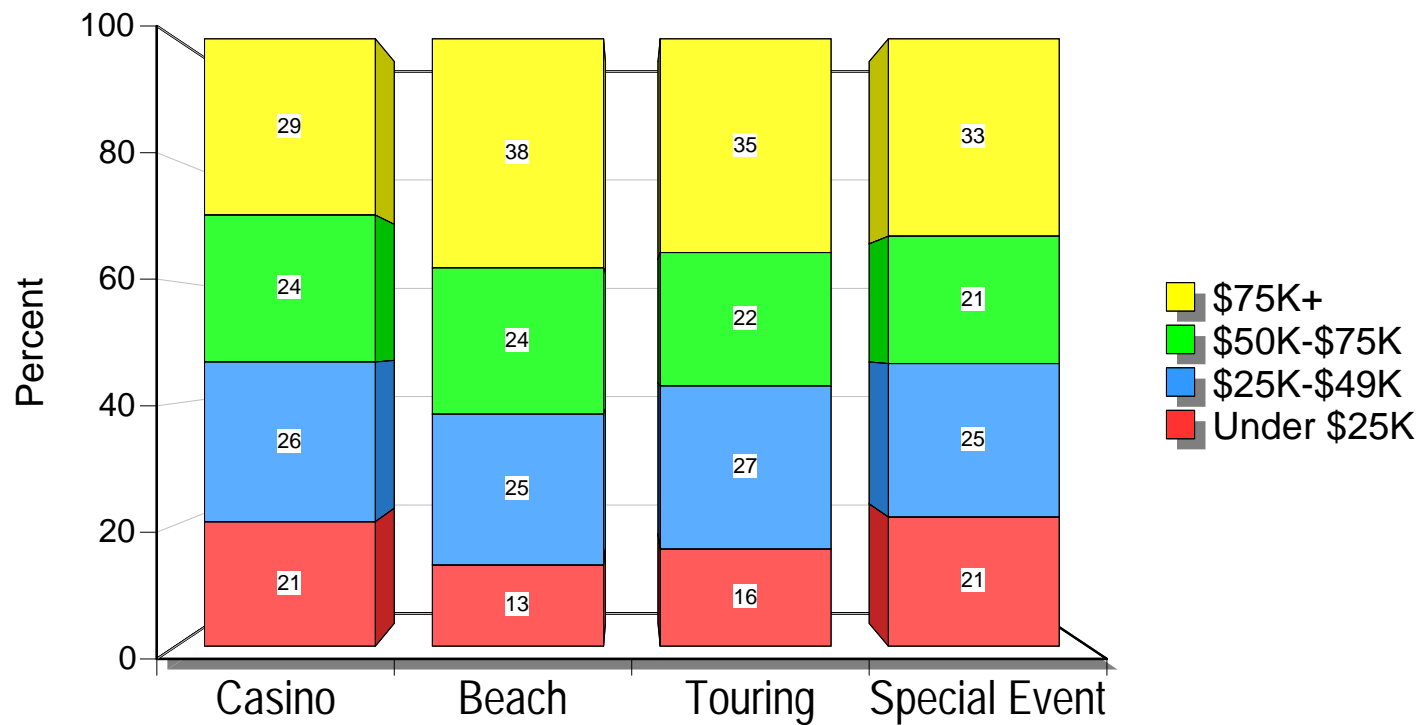
Base: Overnight Trips



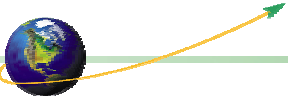
# Income



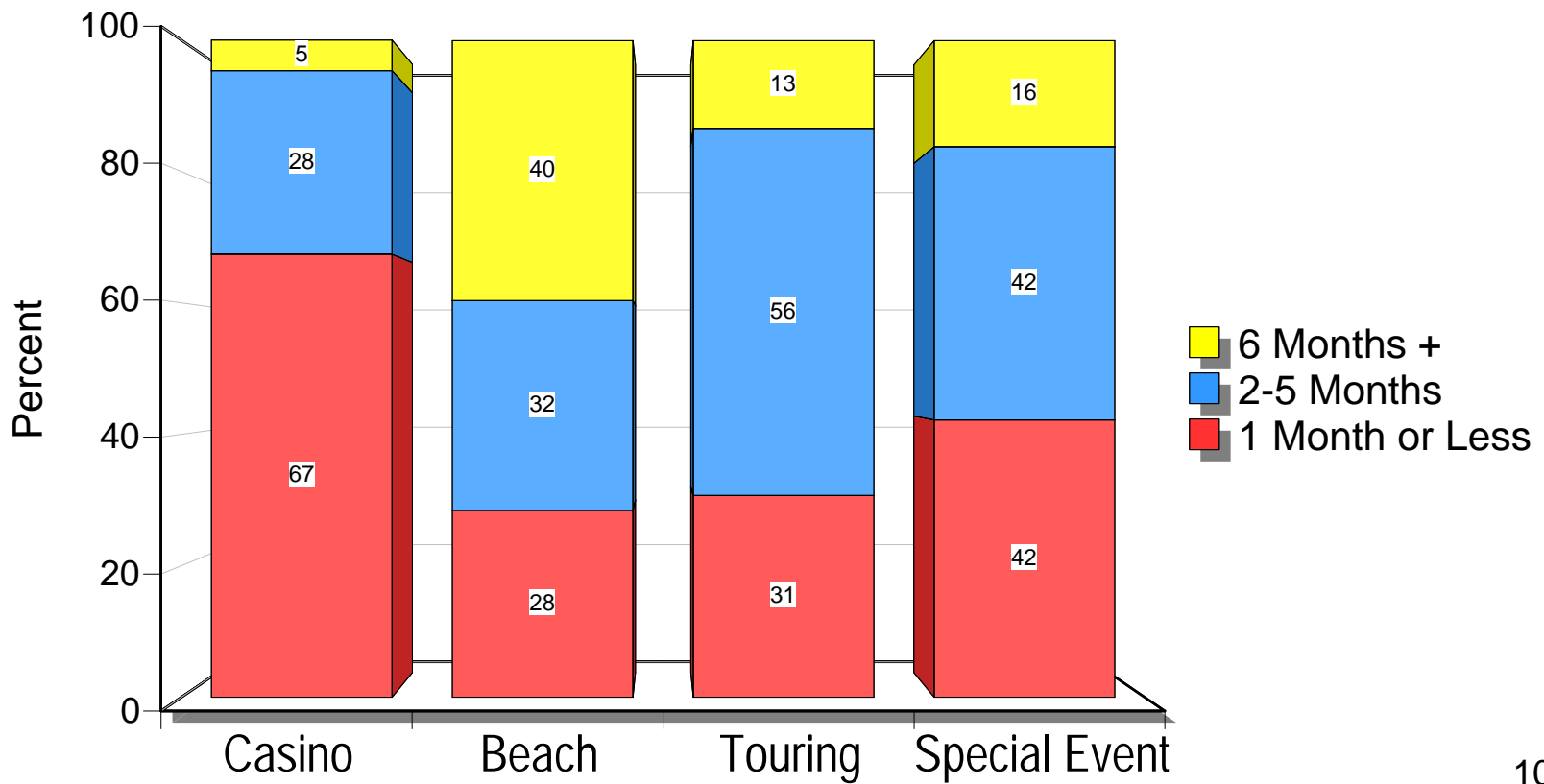
Base: Overnight Trips



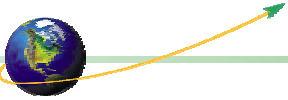
# Planning Cycle



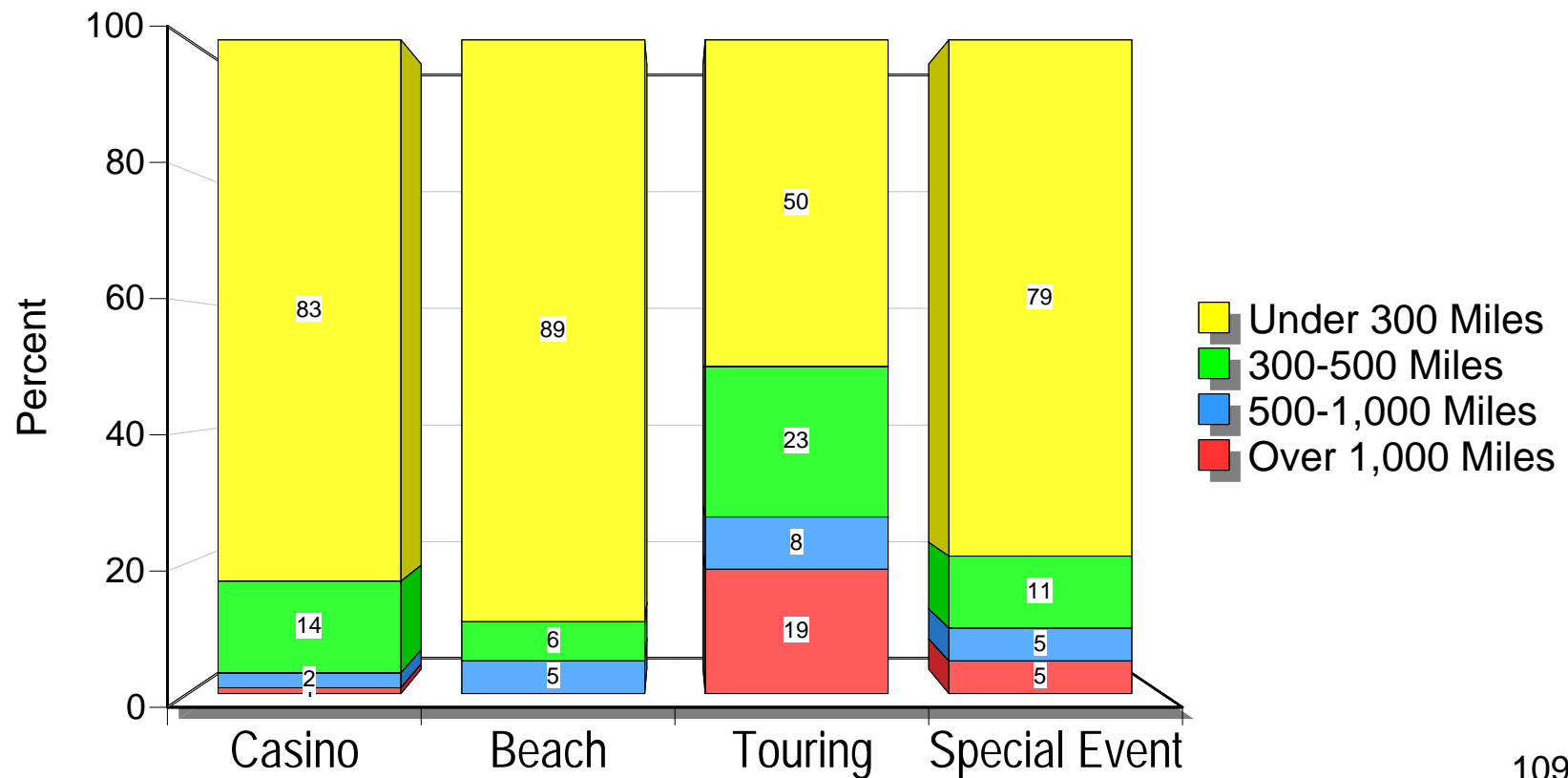
Base: Overnight Trips



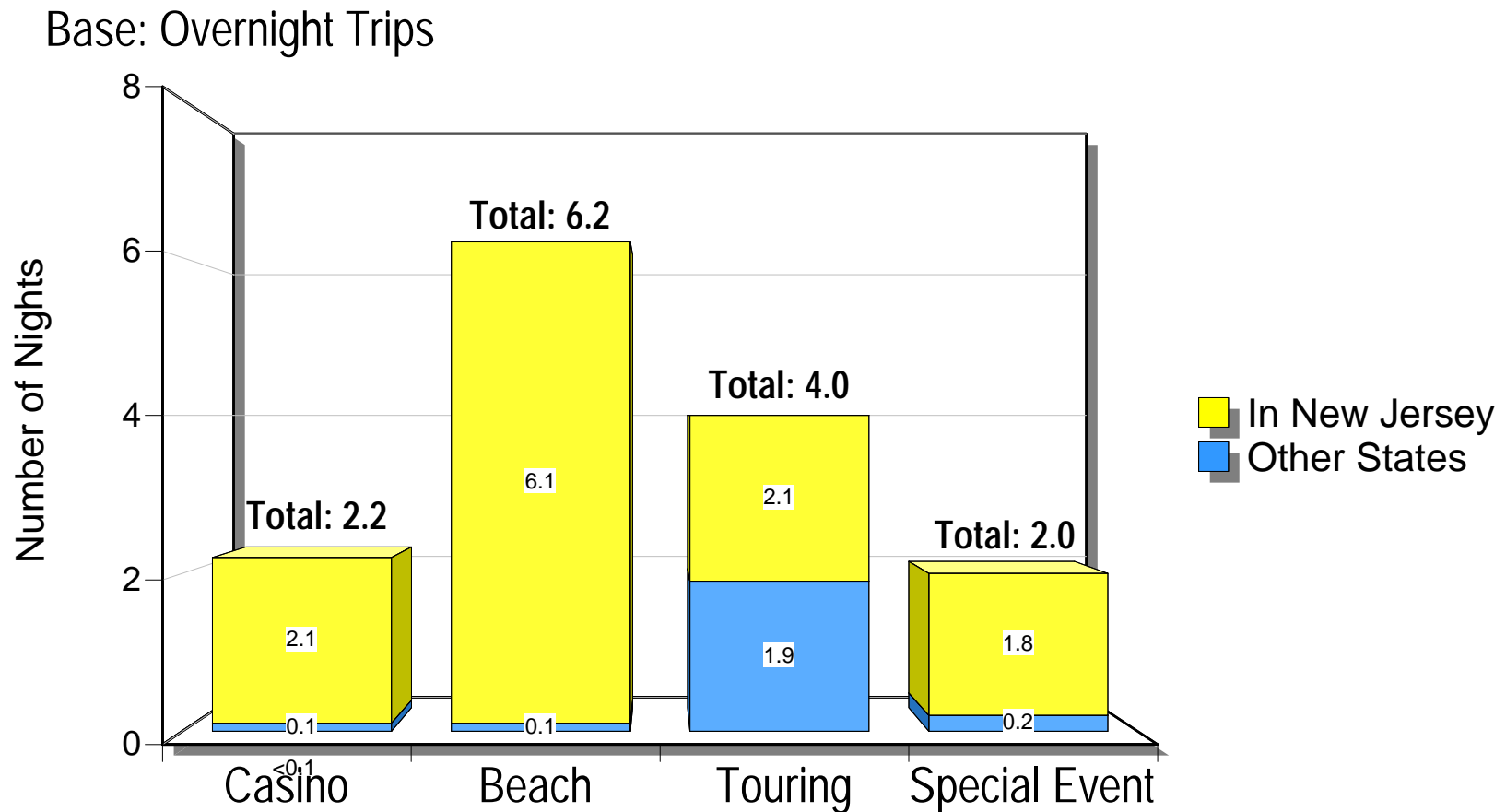
# Distance Traveled to New Jersey



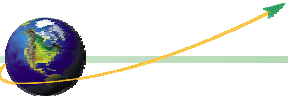
Base: Overnight Trips



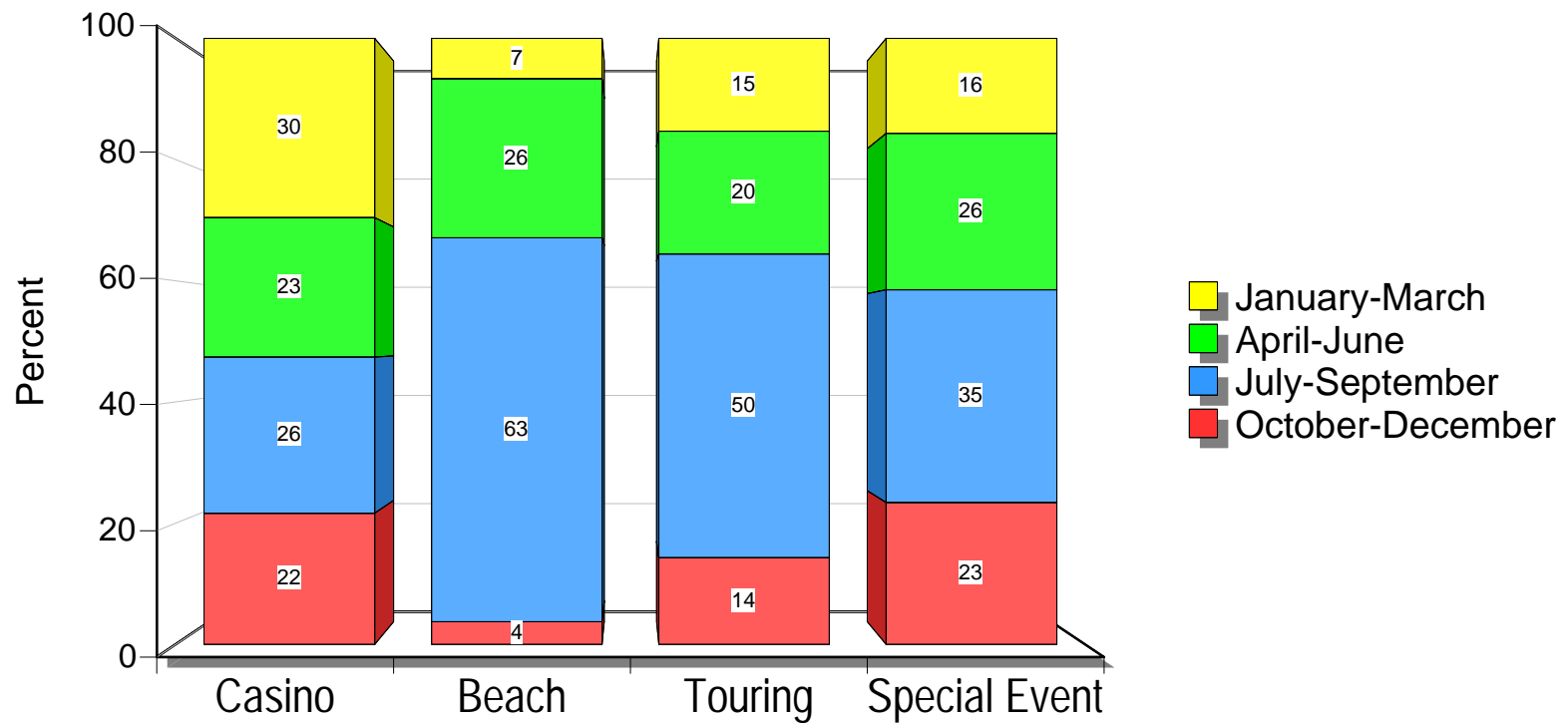
# Average Nights Away – In New Jersey vs. Other States



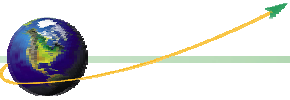
# Seasonality



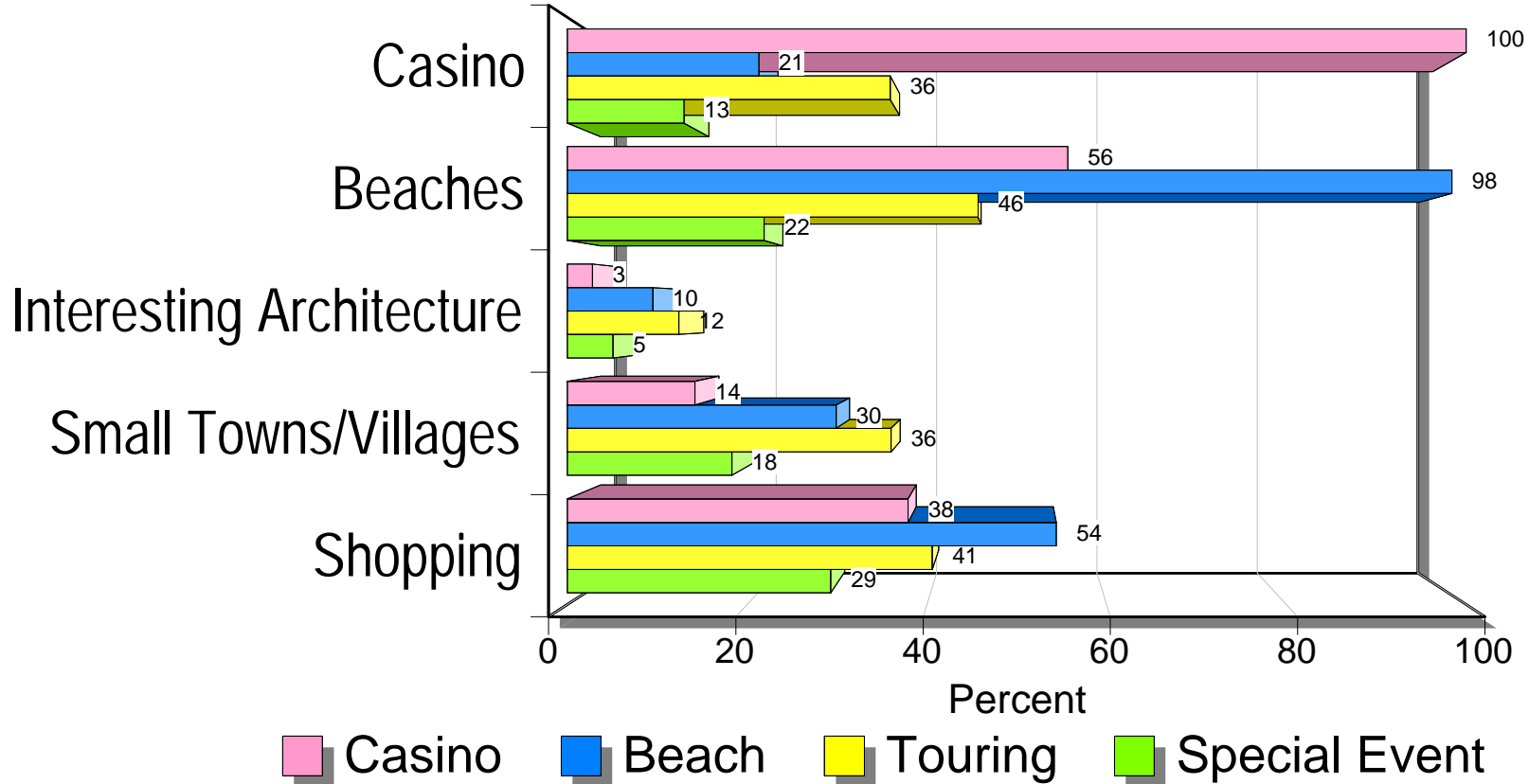
Base: Overnight Trips



# Things Experienced in New Jersey

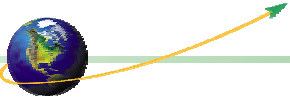


Base: Overnight Trips

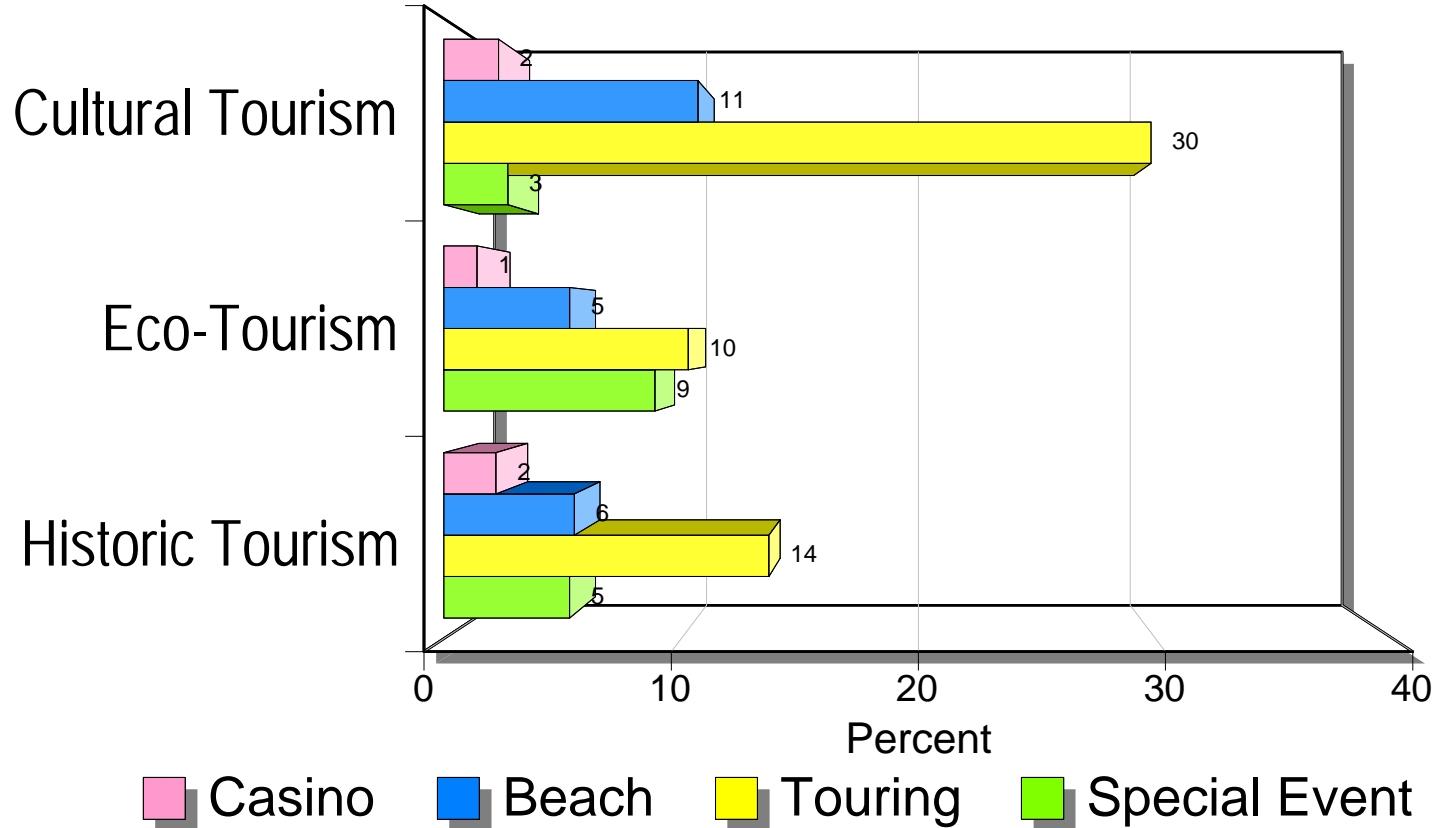




# Cultural, Historic, and Eco-Tourism



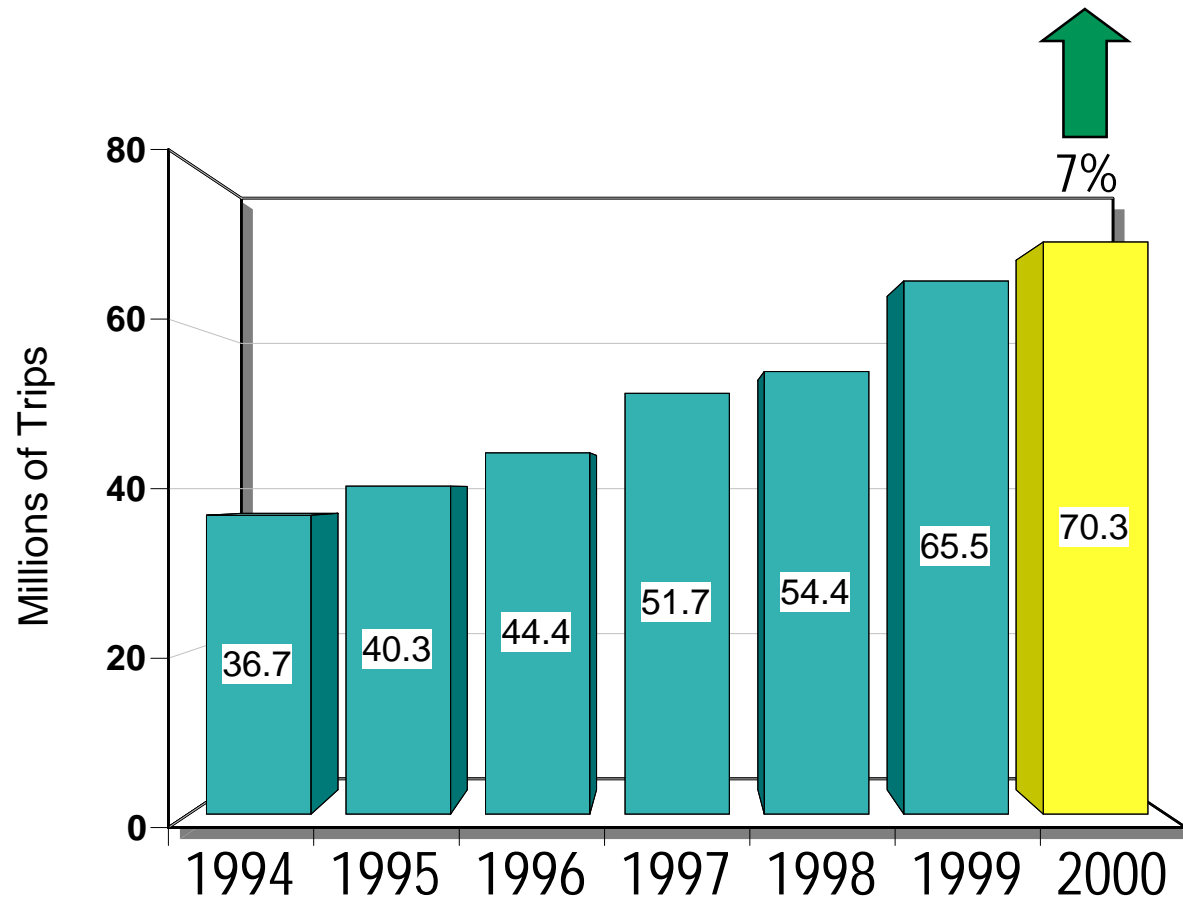
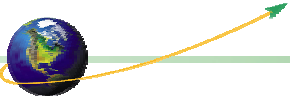
Base: Overnight Trips



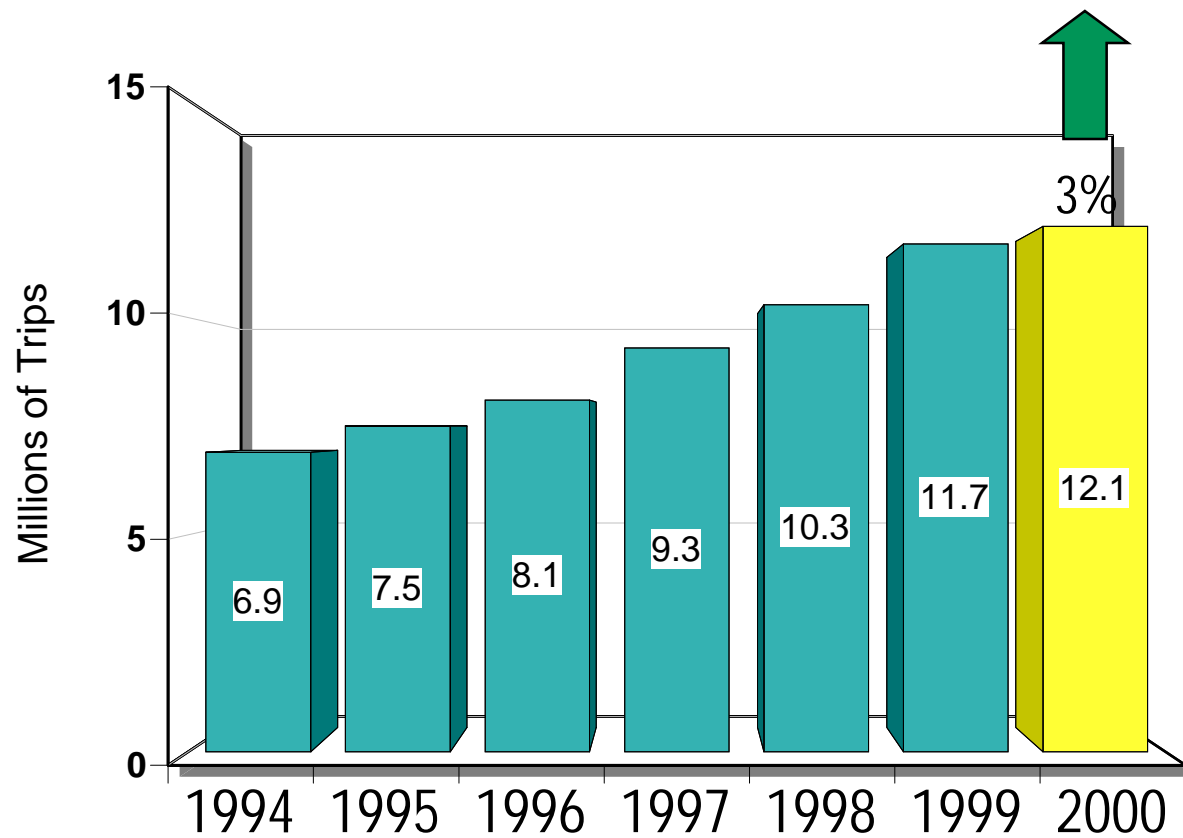
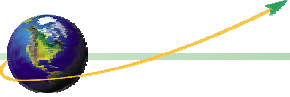


Gaming

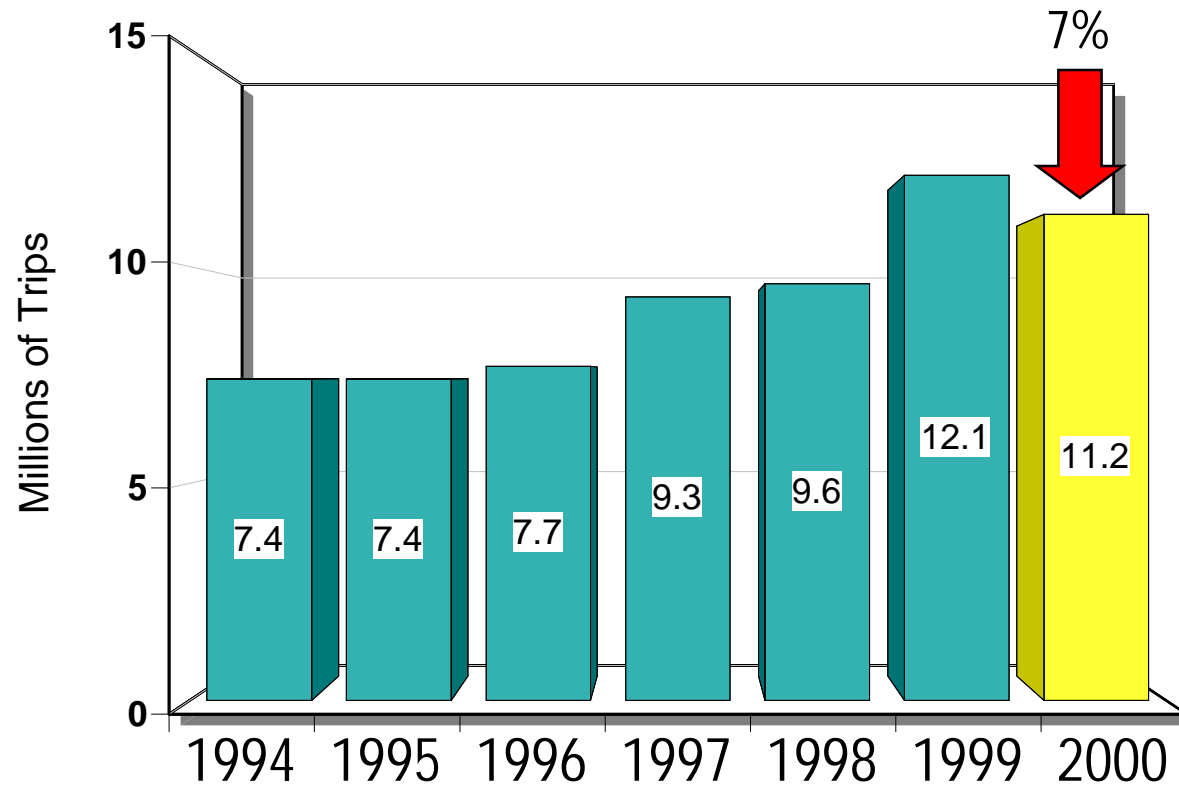
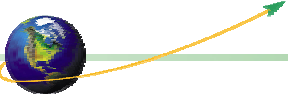
# Total U.S. Overnight Casino Trips



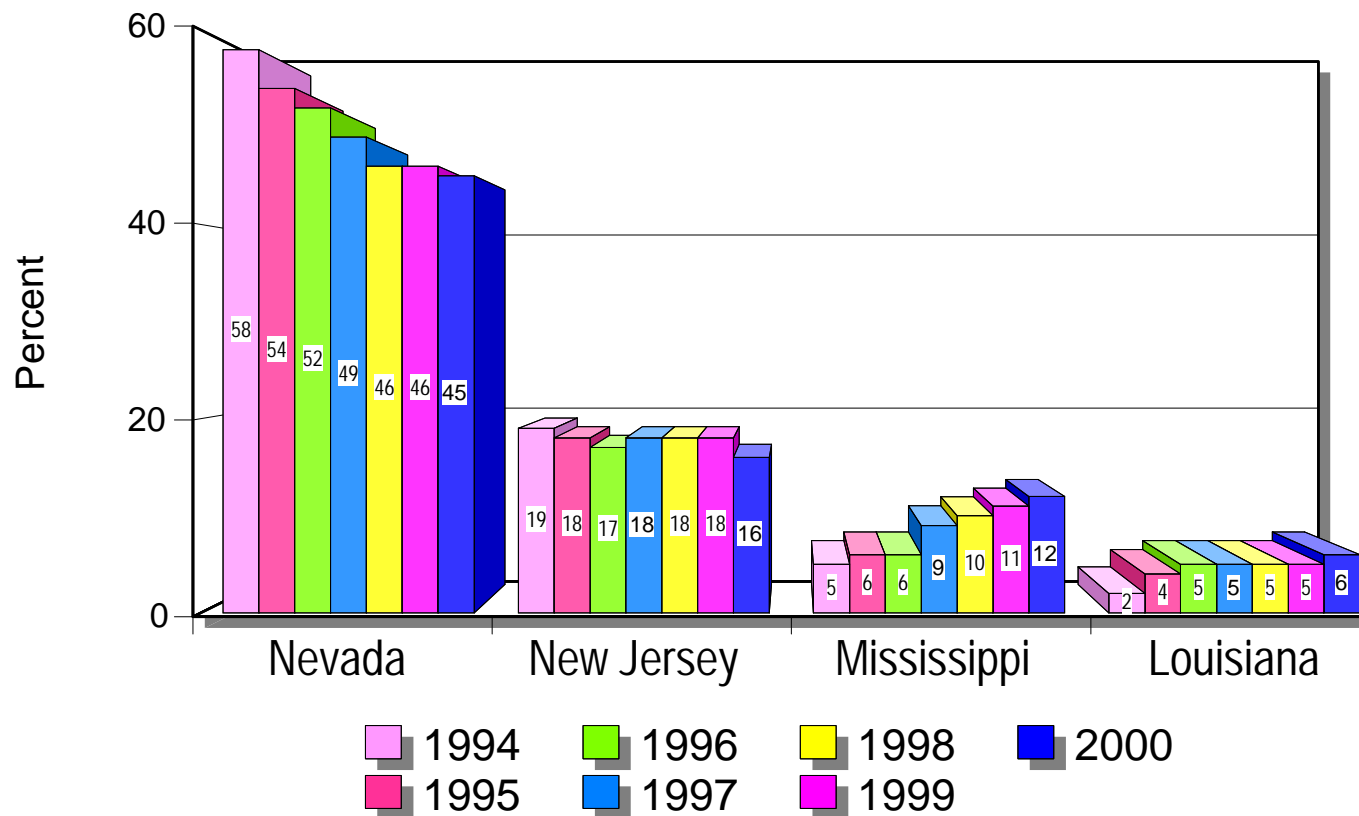
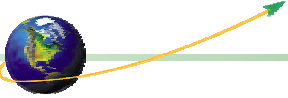
# Total Overnight Casino Trips by Mid-Atlantic Residents



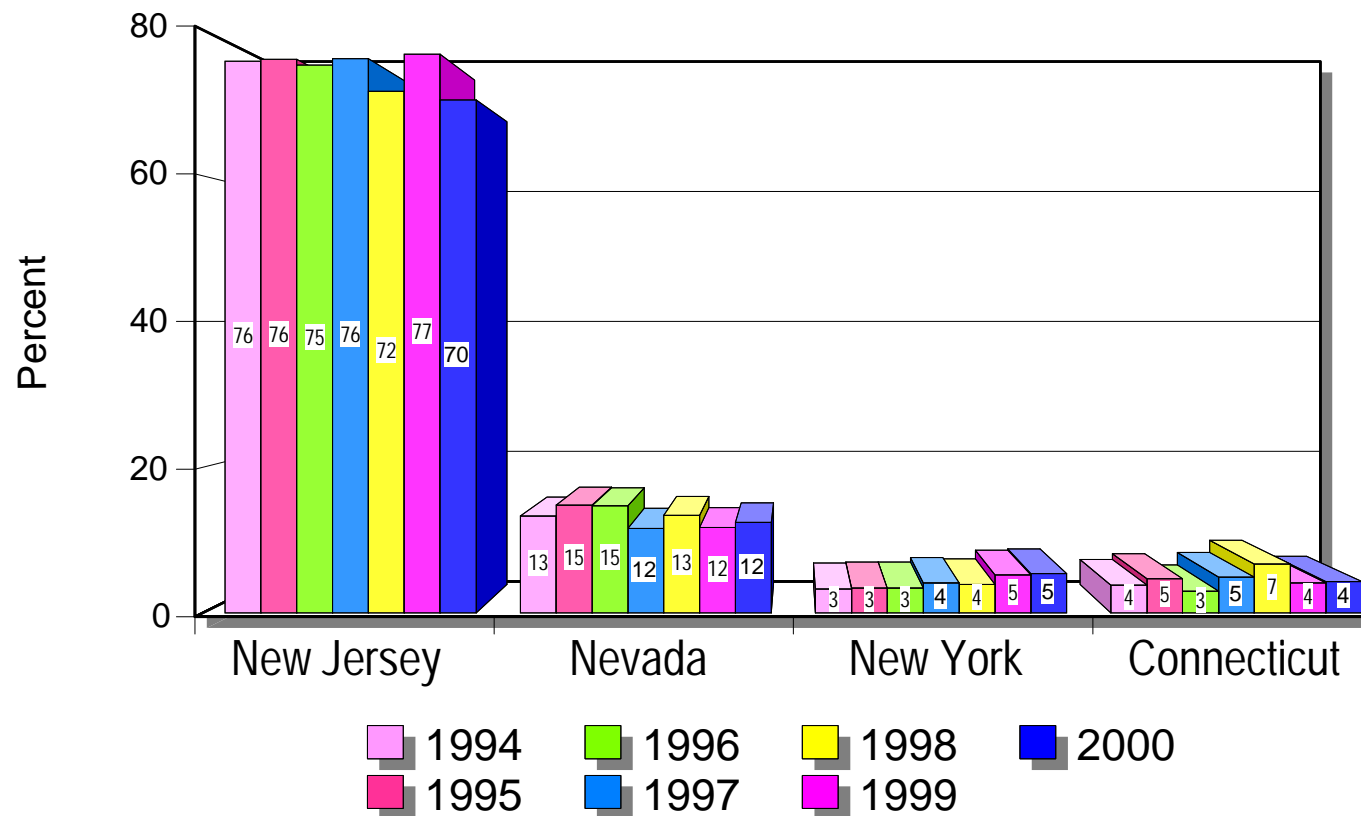
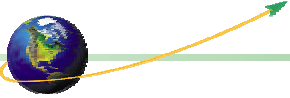
# Overnight Casino Trips to New Jersey



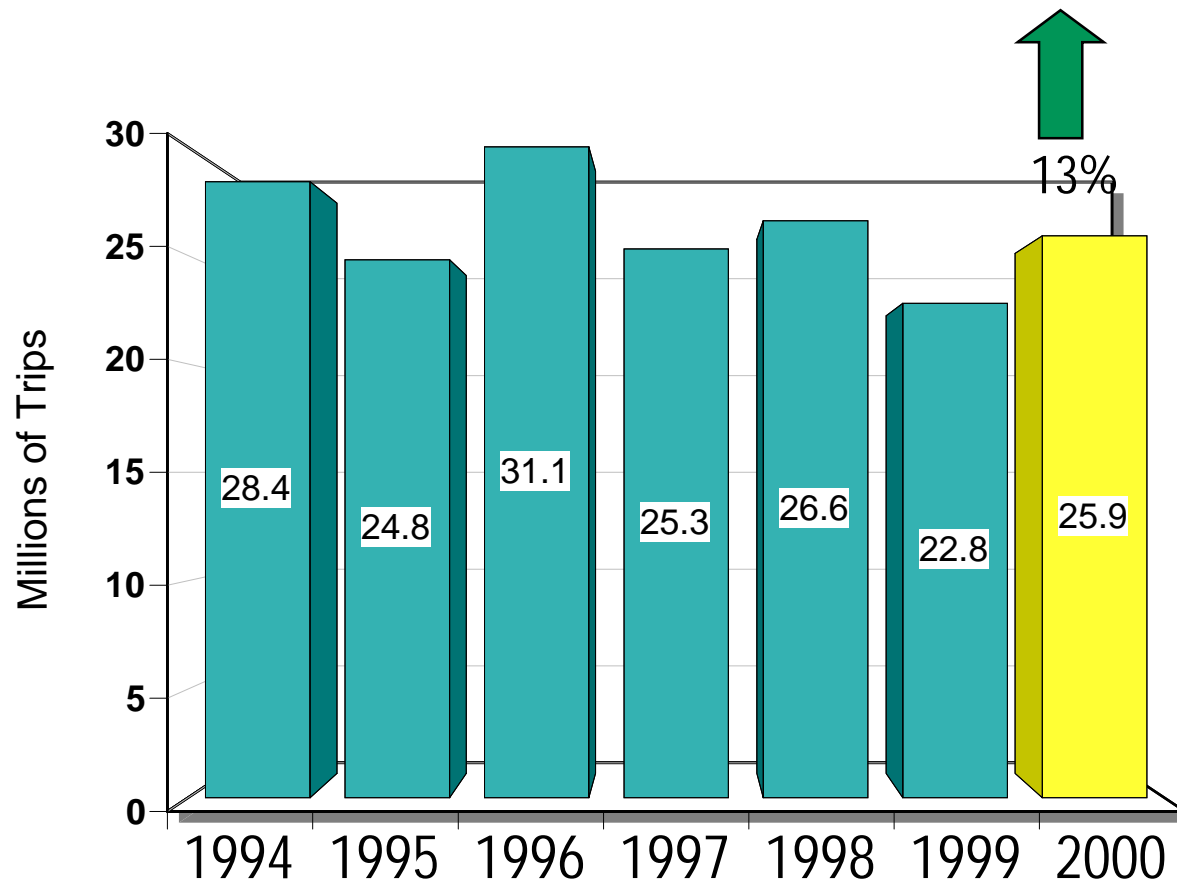
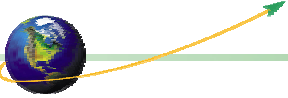
# Destination of U.S. Overnight Casino Trips



# Destination of Mid-Atlantic Overnight Casino Trips



# Day Casino Trips to New Jersey



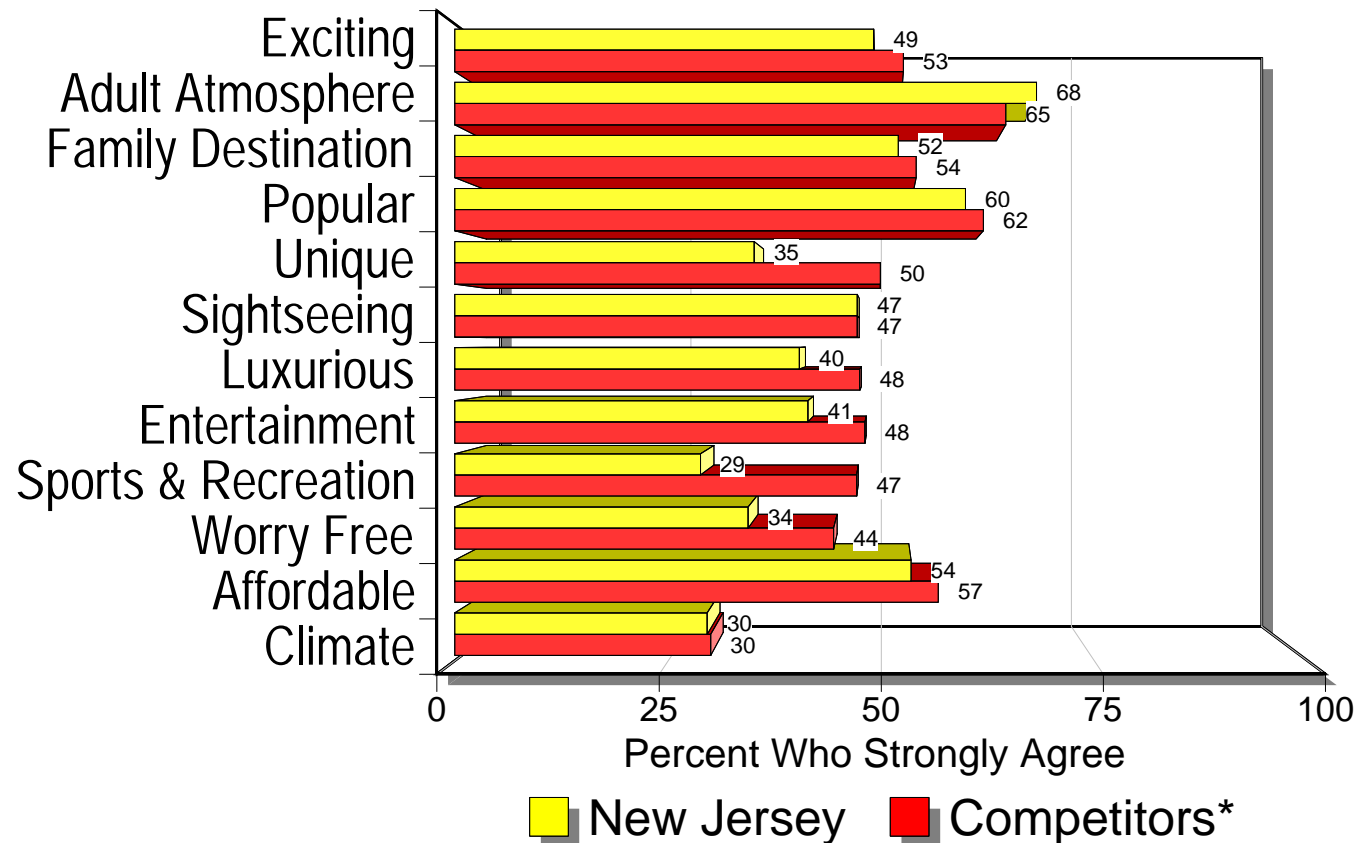
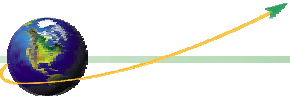




## New Jersey's Image

# New Jersey's Image vs. Competitors\*

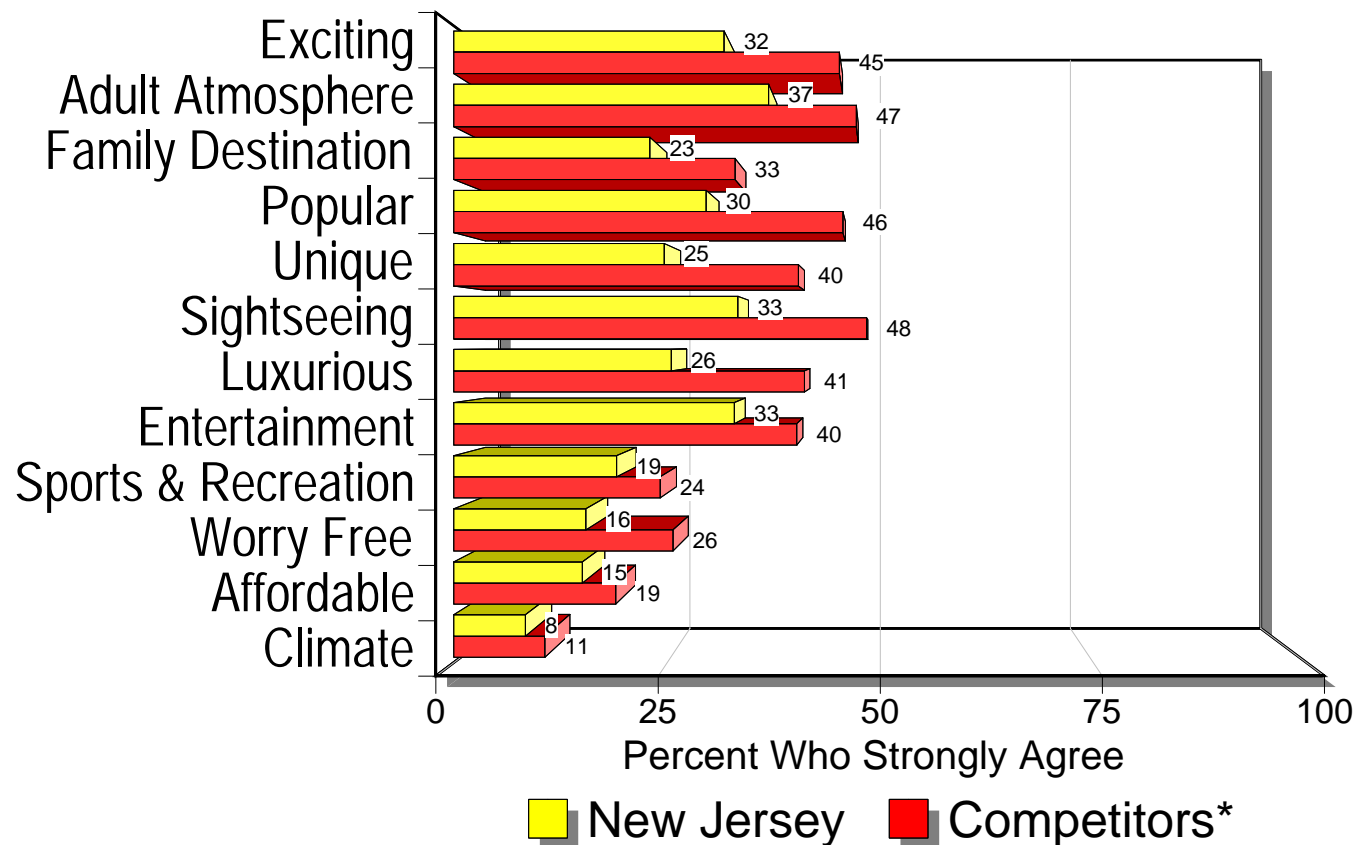
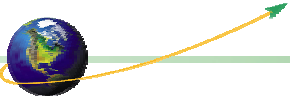
## — Mid-Atlantic Markets



\*Includes New York, Pennsylvania, Delaware

# New Jersey's Image vs. Competitors

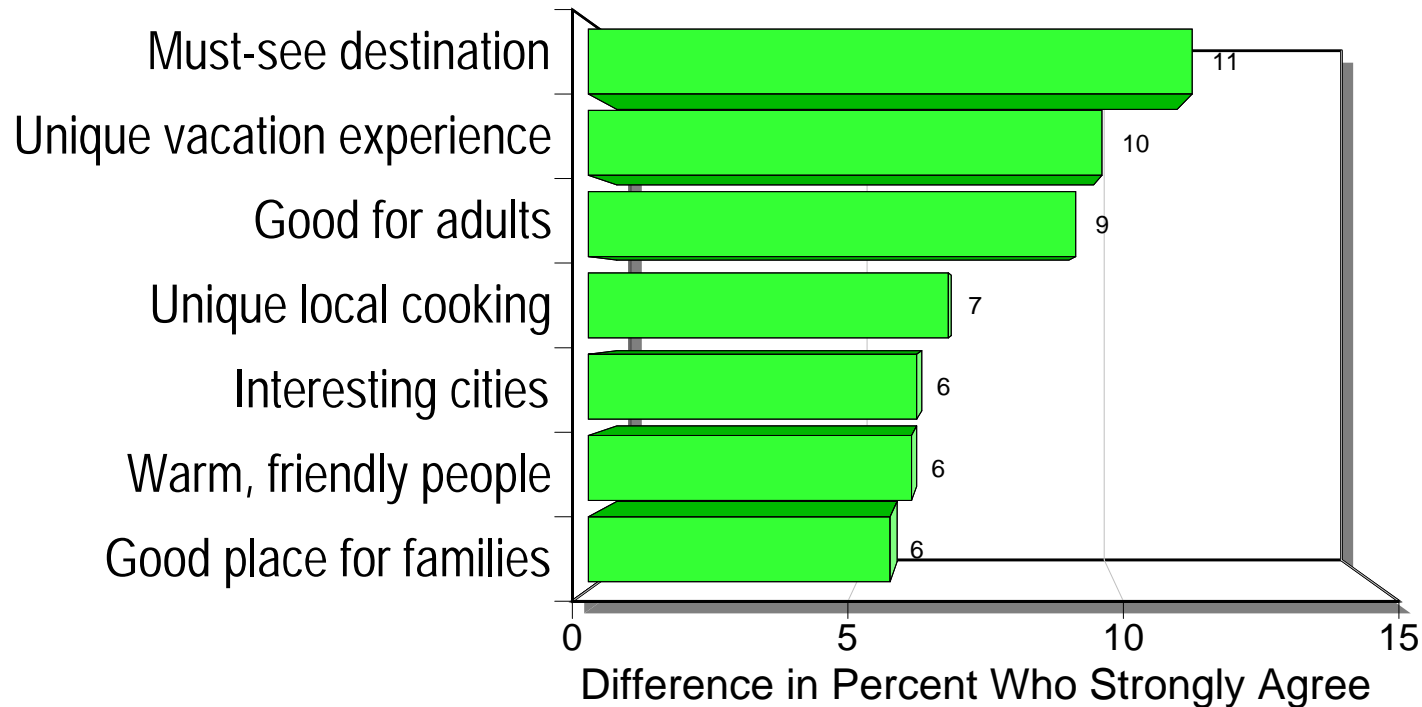
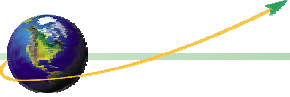
## — Other U.S. Markets



\*Includes New York, Pennsylvania, Delaware

## New Jersey's Image Gains Vs. Competitors\*

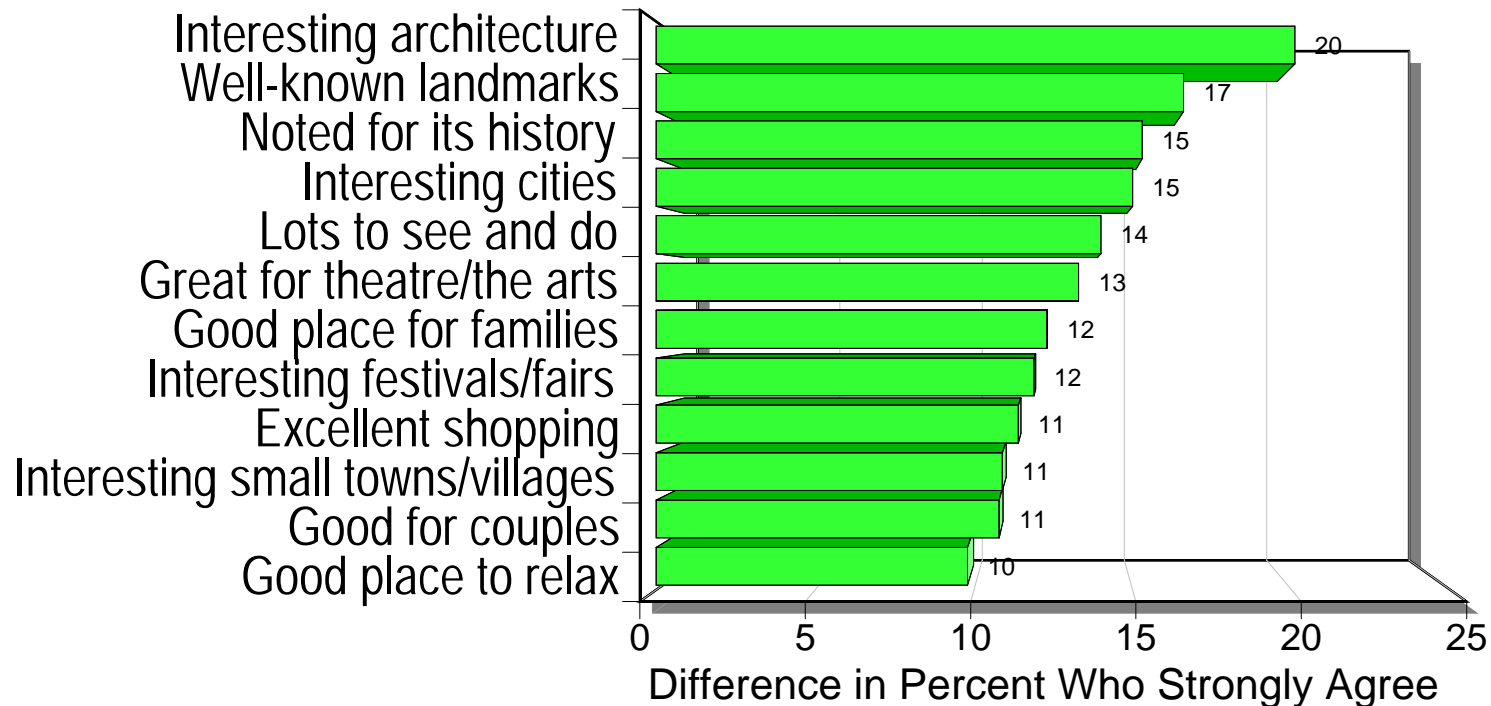
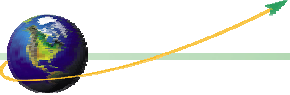
— Mid-Atlantic Markets, 2000 vs. 1998



\*Includes New York, Pennsylvania, Delaware

# New Jersey's Image Gains Vs. Competitors\*

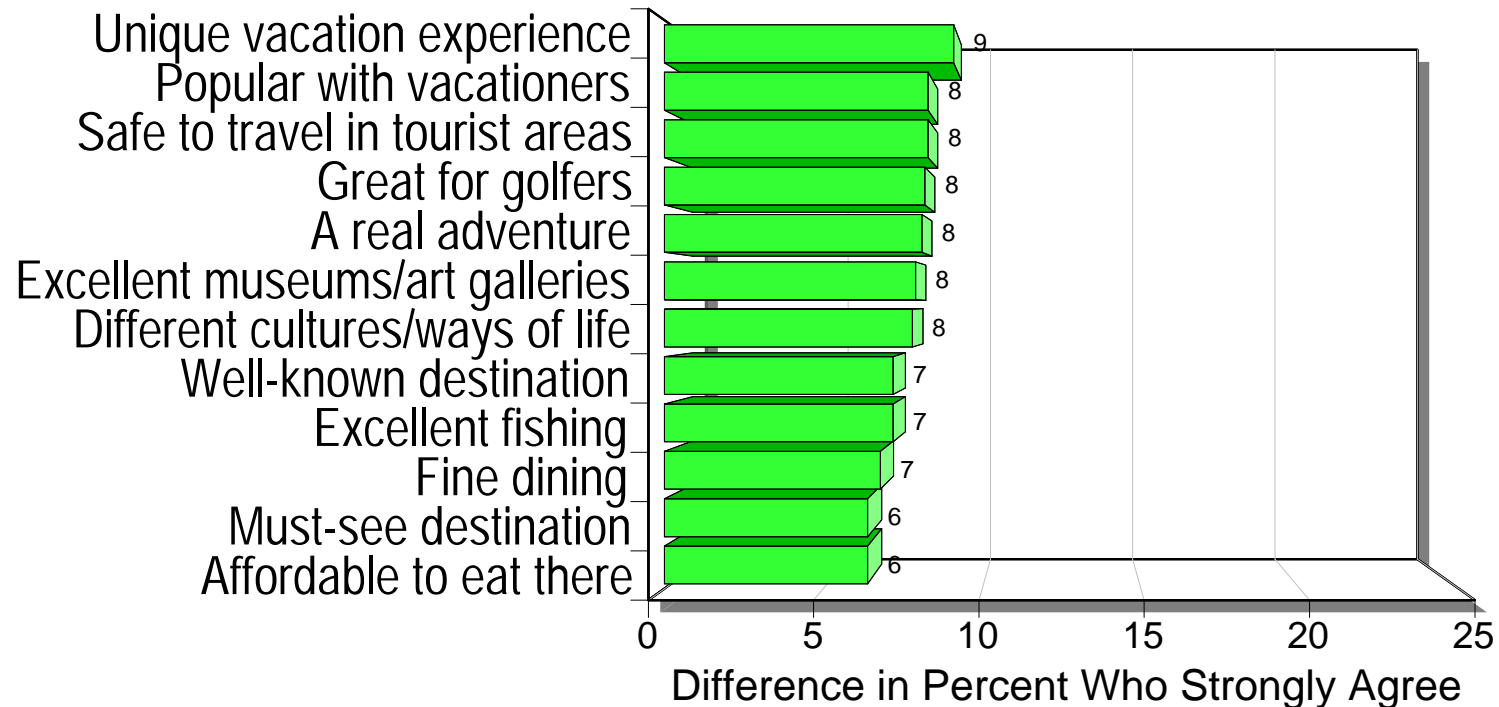
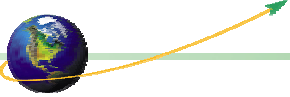
— Other U.S. Markets, 2000 vs. 1998



\*Includes New York, Pennsylvania, Delaware

## New Jersey's Image Gains Vs. Competitors\* (Cont'd)

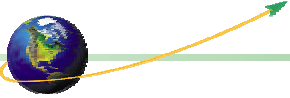
— Other U.S. Markets, 2000 vs. 1998



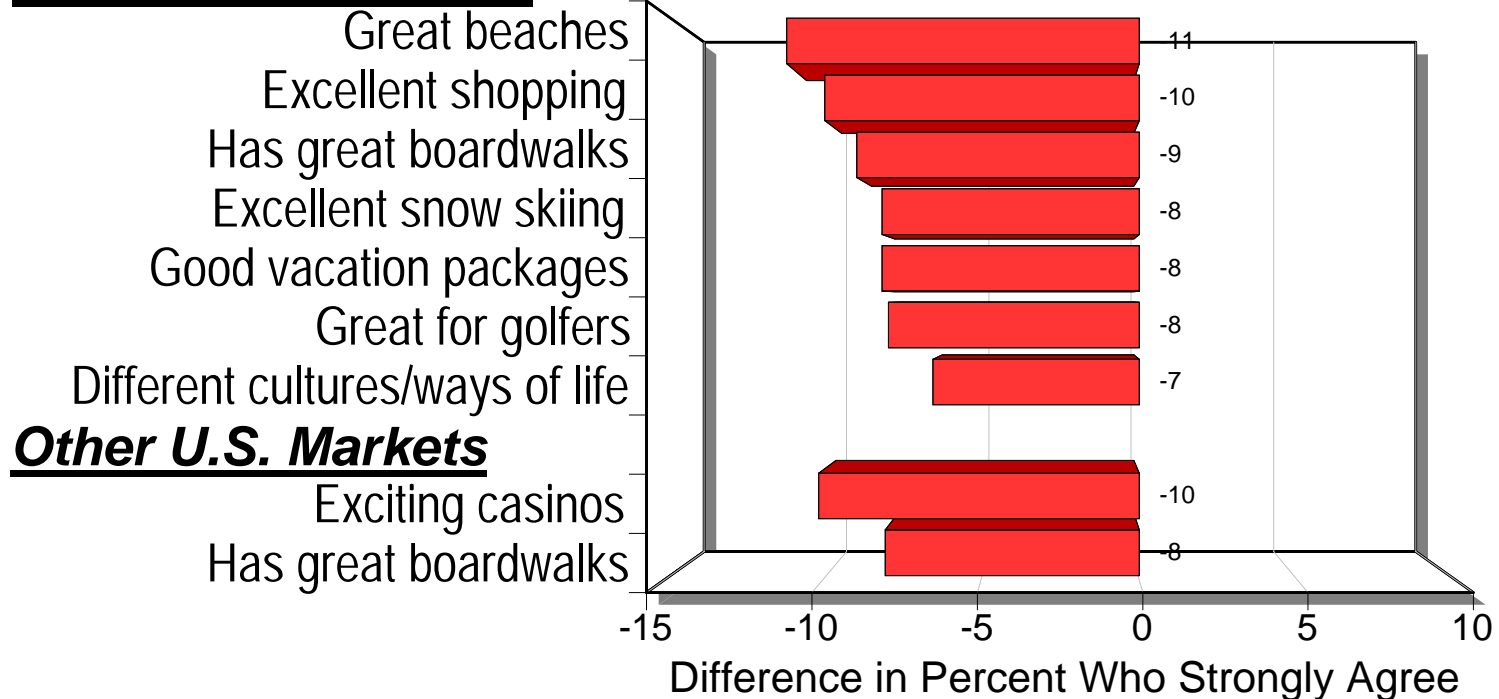
\*Includes New York, Pennsylvania, Delaware

# New Jersey's Image Losses Vs. Competitors\*

## — 2000 vs. 1998



### **Mid-Atlantic Markets**



\*Includes New York, Pennsylvania, Delaware



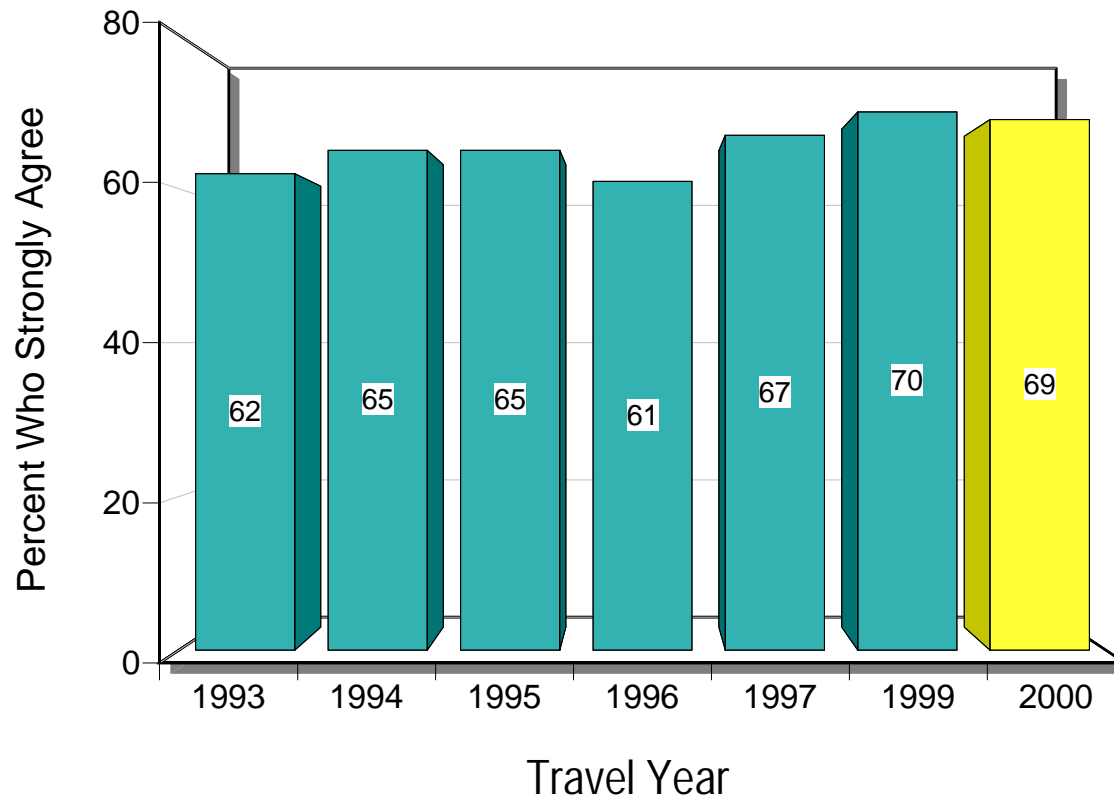
# New Jersey's Product Delivery



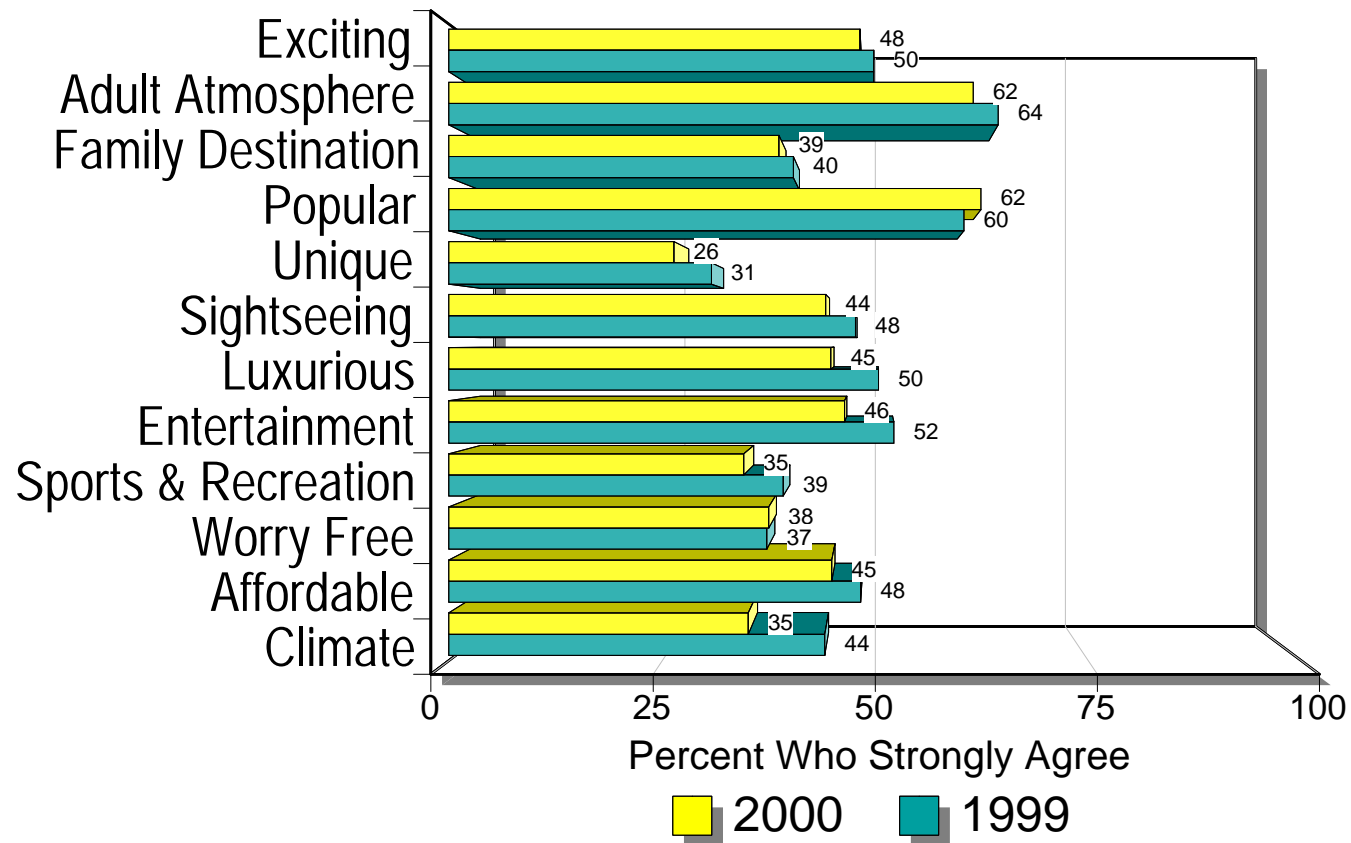
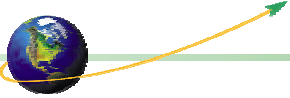
# New Jersey's Image as "A Place I Would Really Enjoy Visiting"



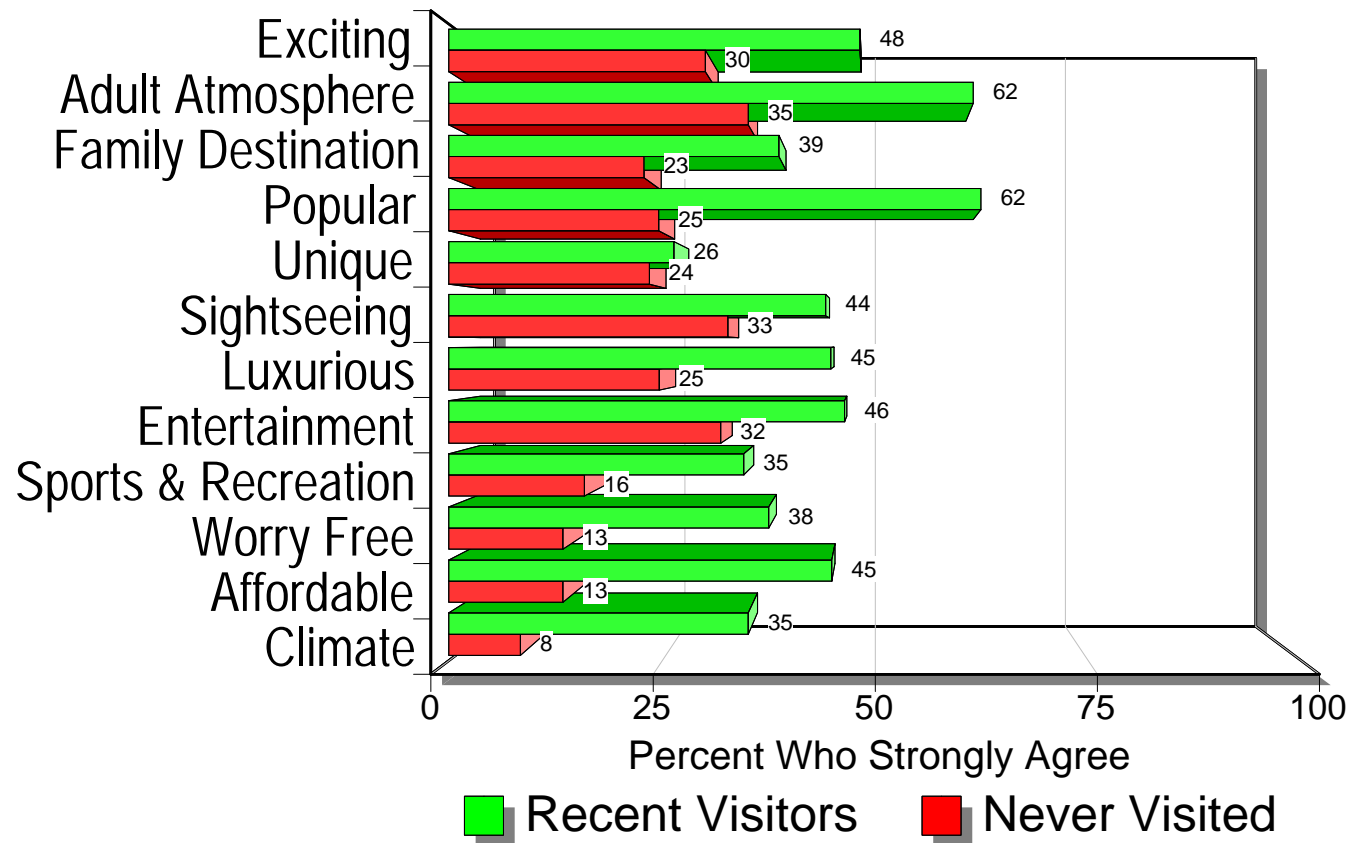
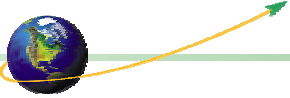
Base: Overnight Pleasure Trips



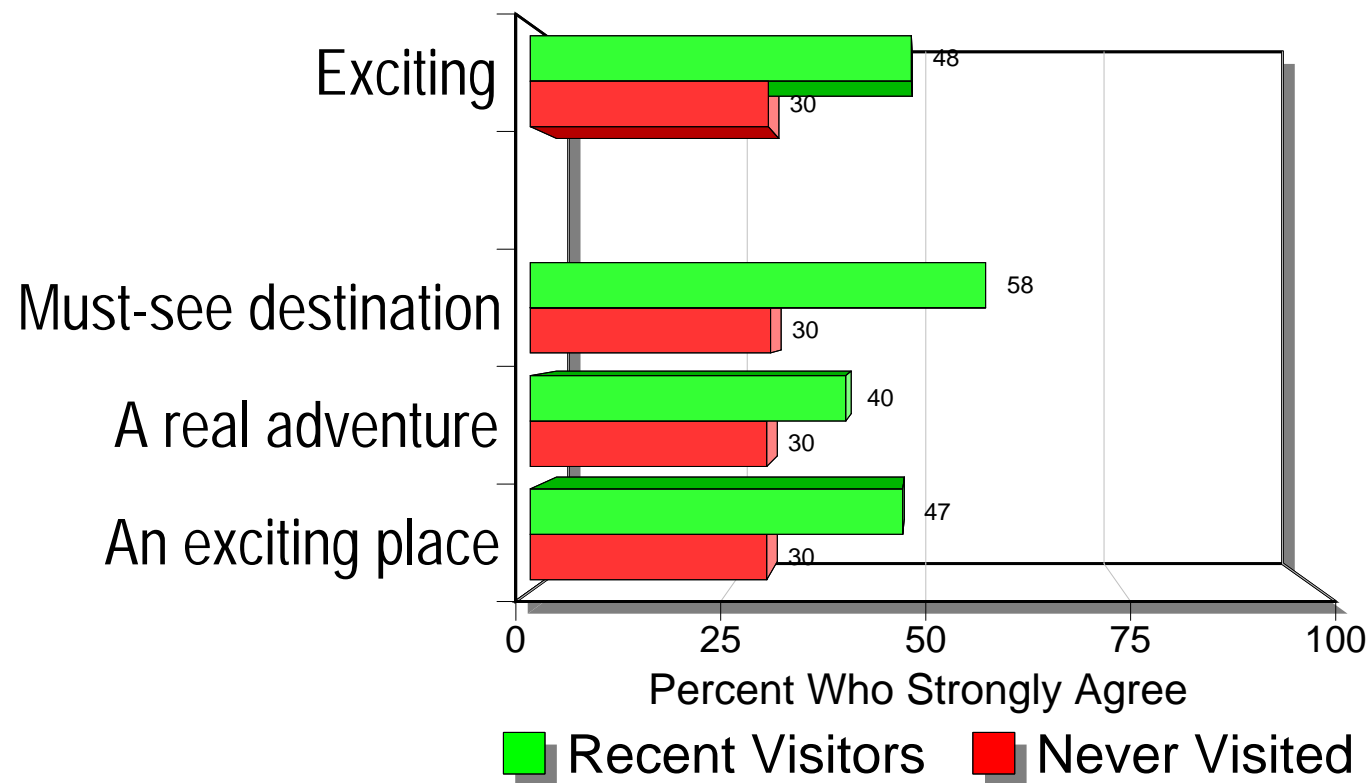
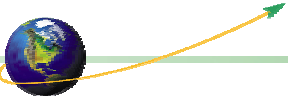
# New Jersey's Tourism Product — 2000 vs. 1999



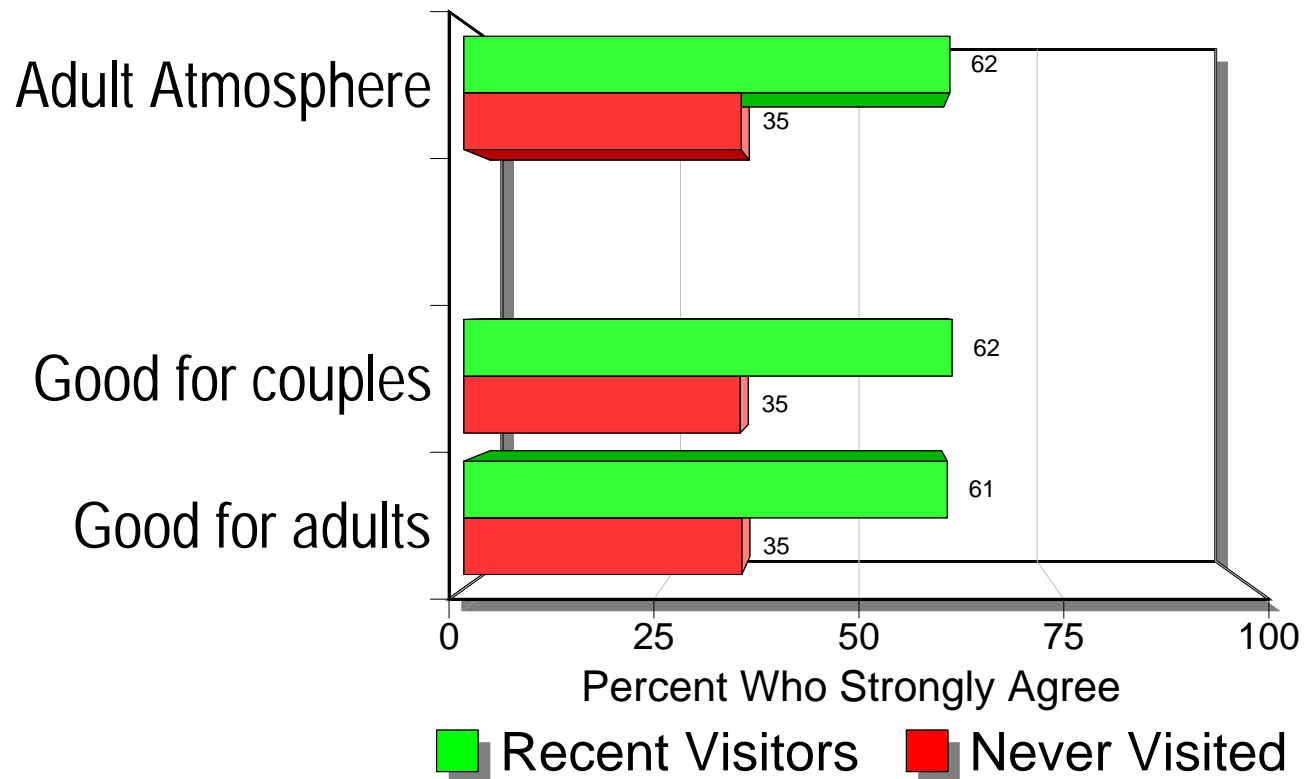
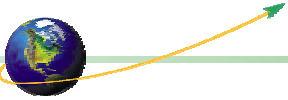
# New Jersey's Product vs. Image



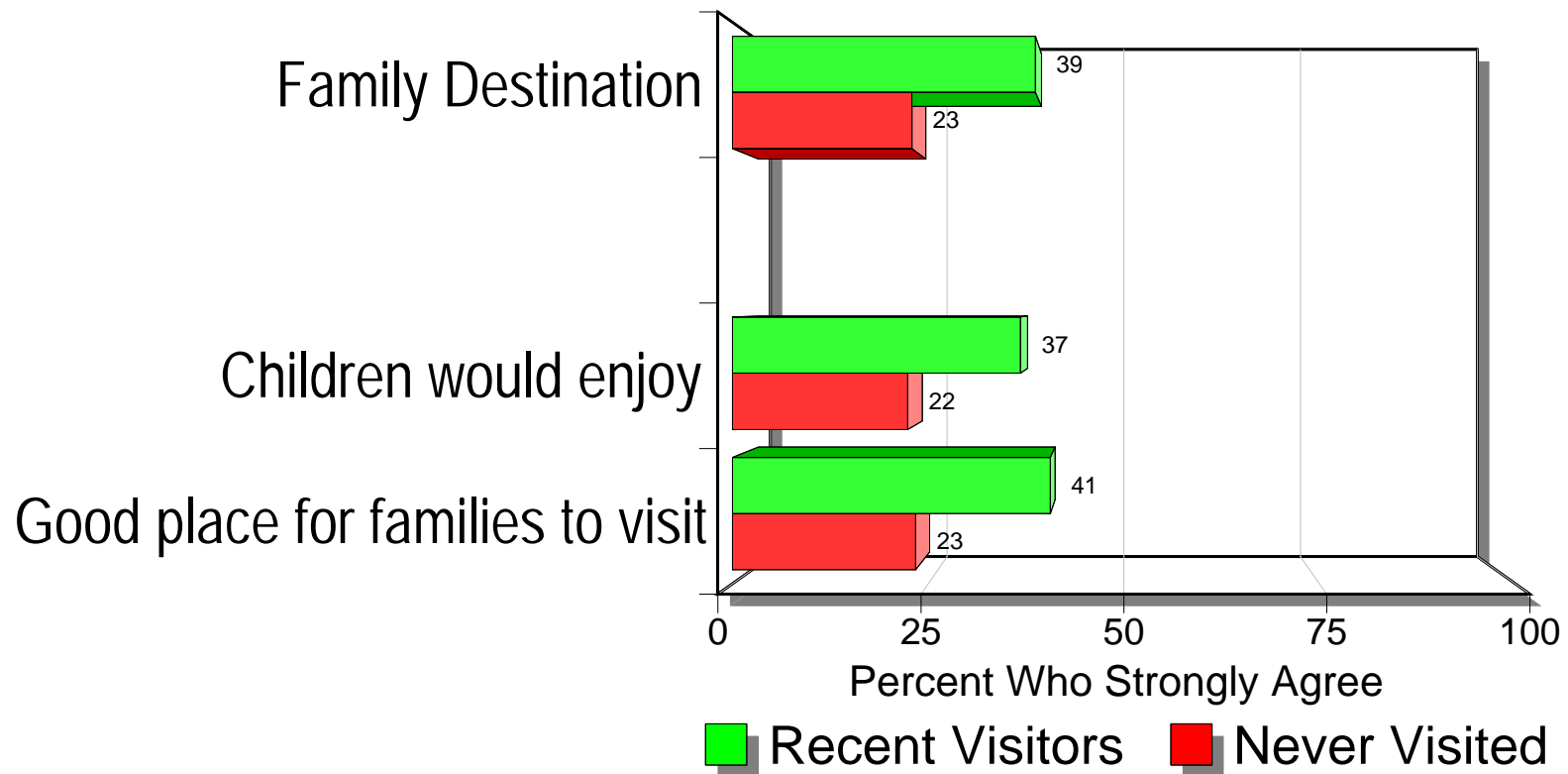
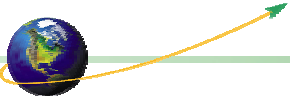
# Exciting



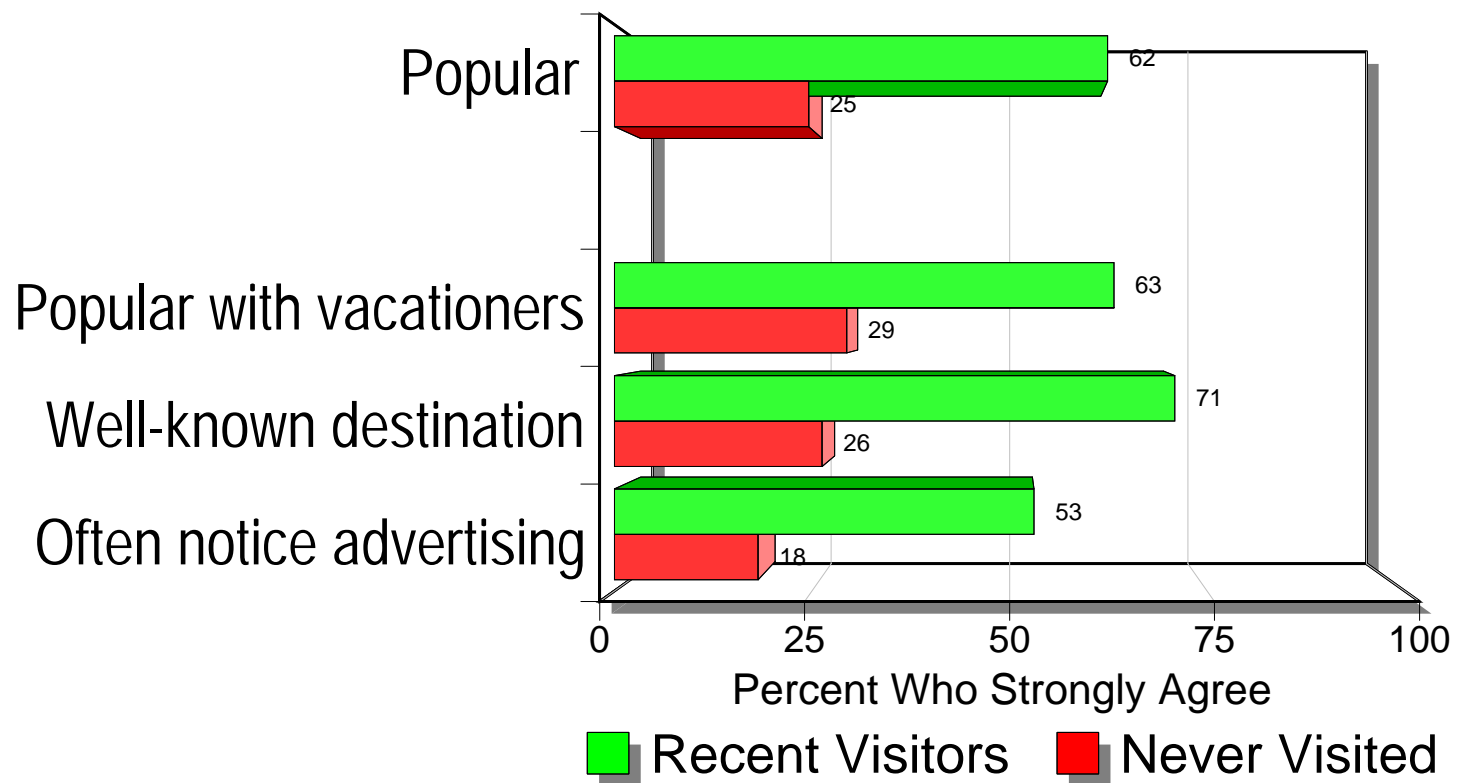
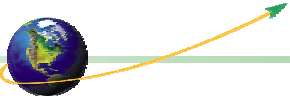
# Adult Atmosphere



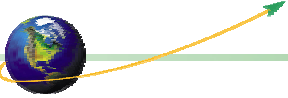
# Family Destination



# Popular

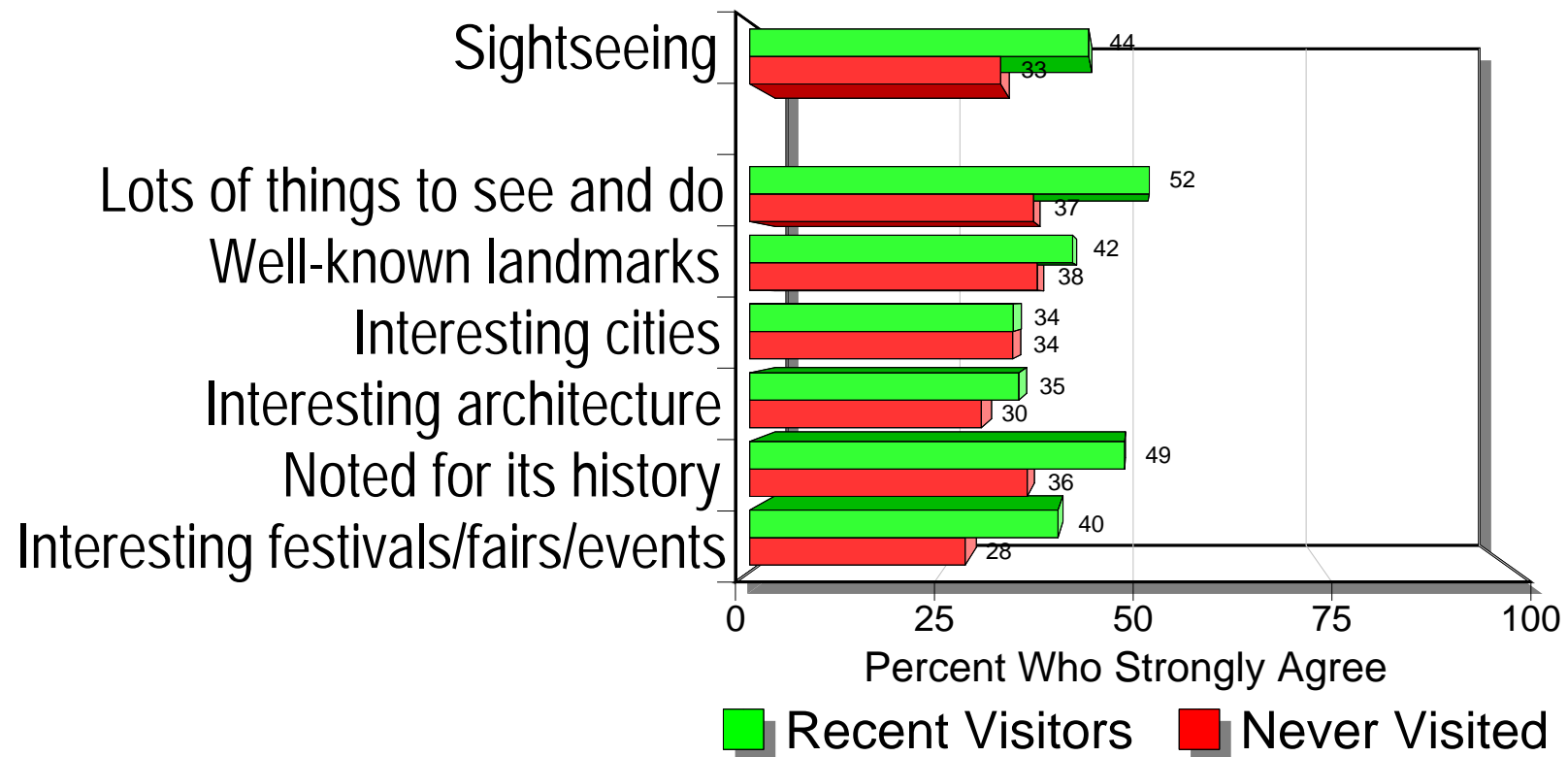
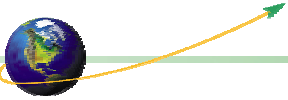


# Unique

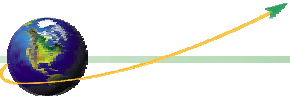




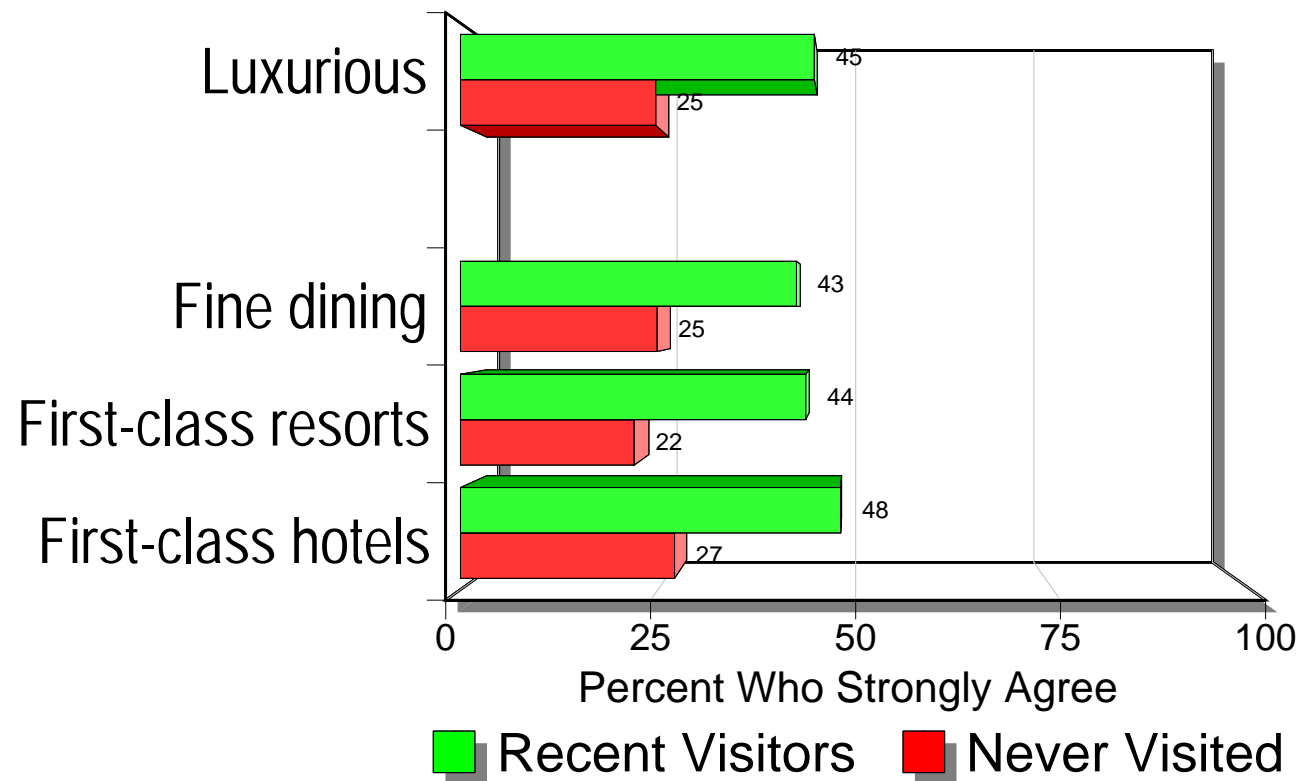
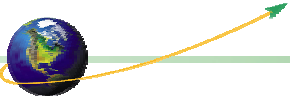
# Sightseeing



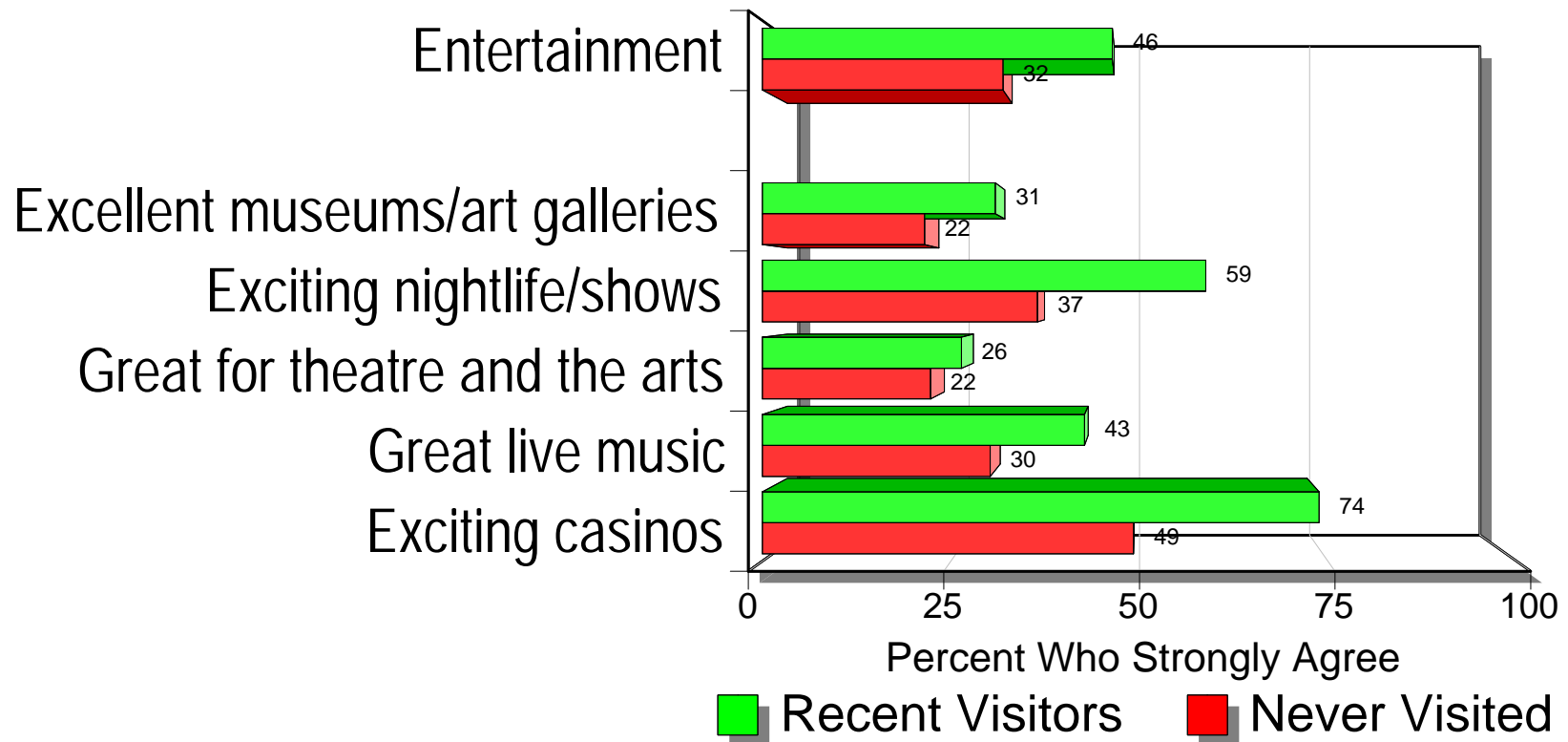
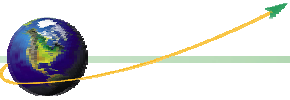
## Sightseeing (Cont'd)



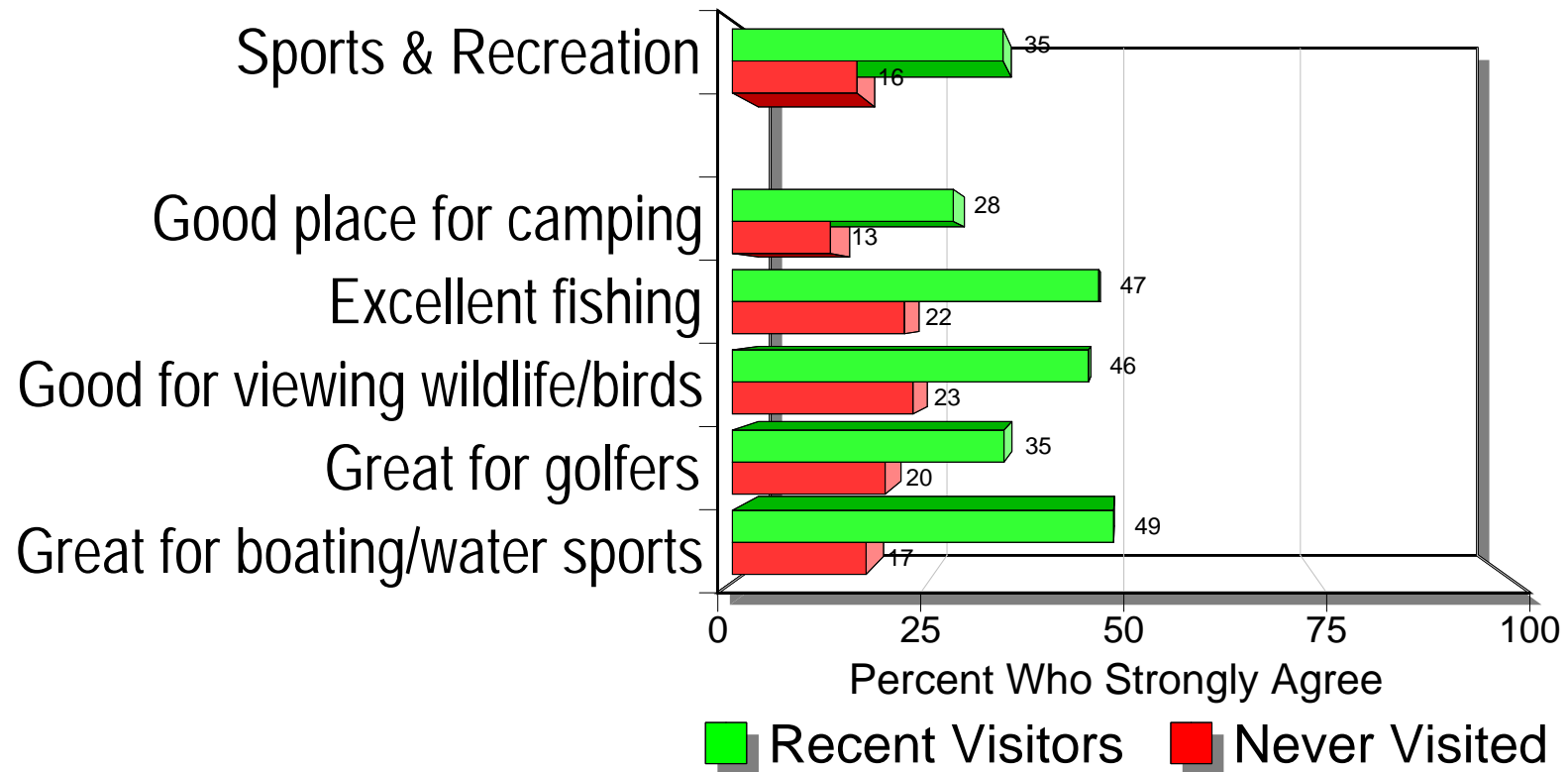
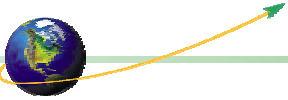
# Luxurious



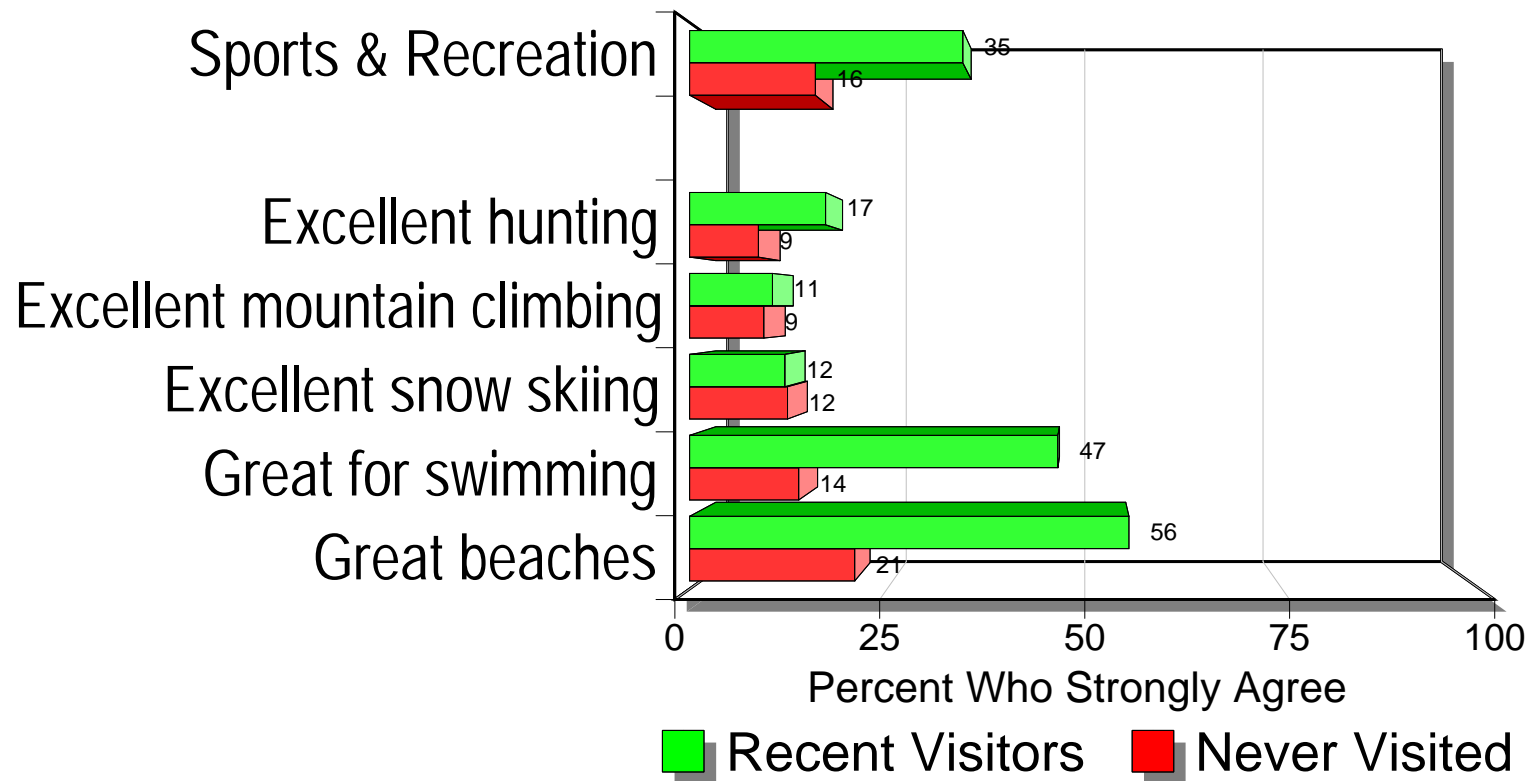
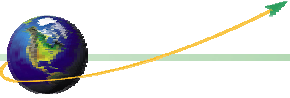
# Entertainment



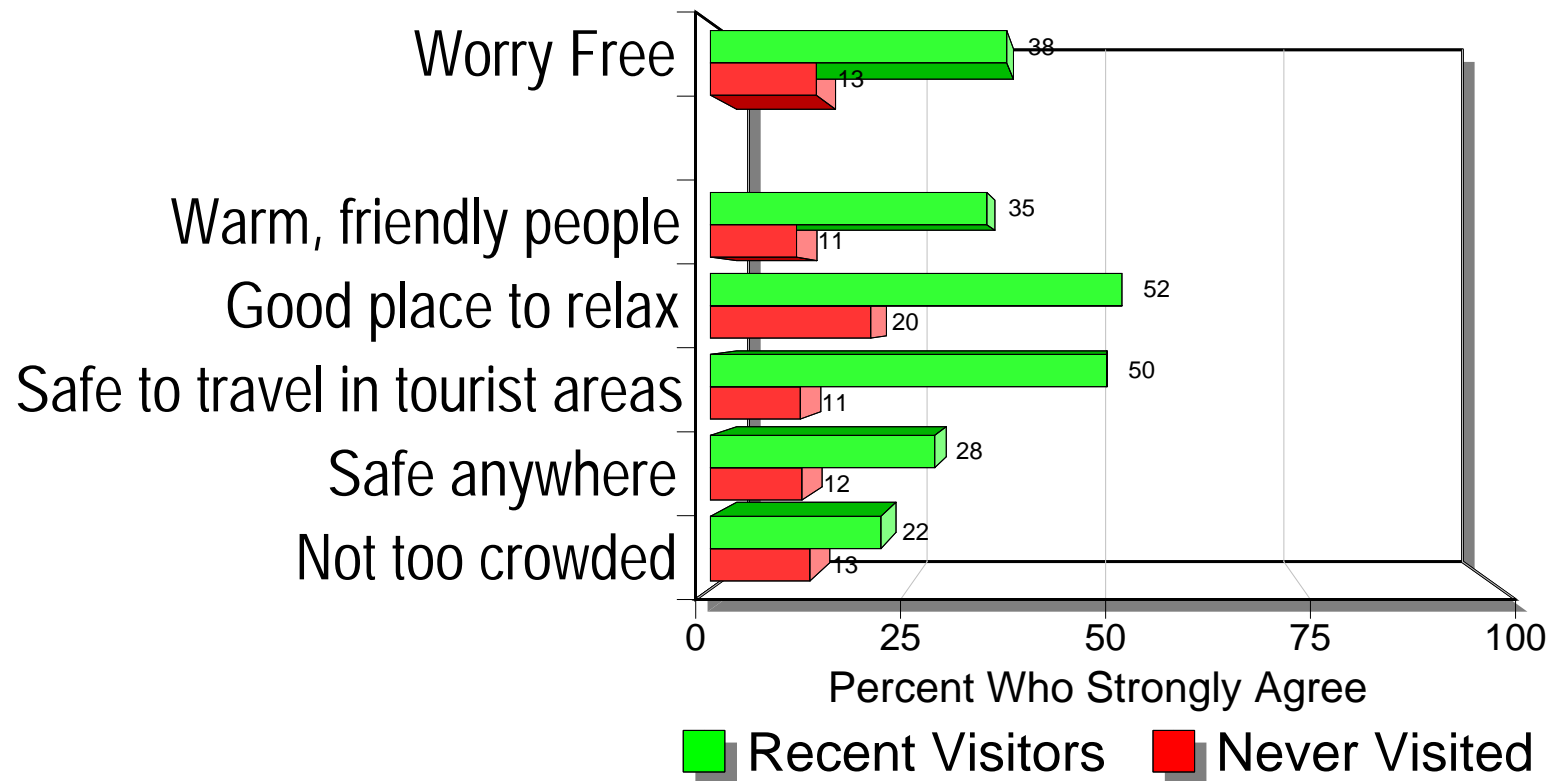
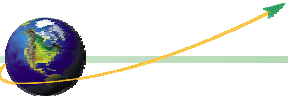
# Sports & Recreation



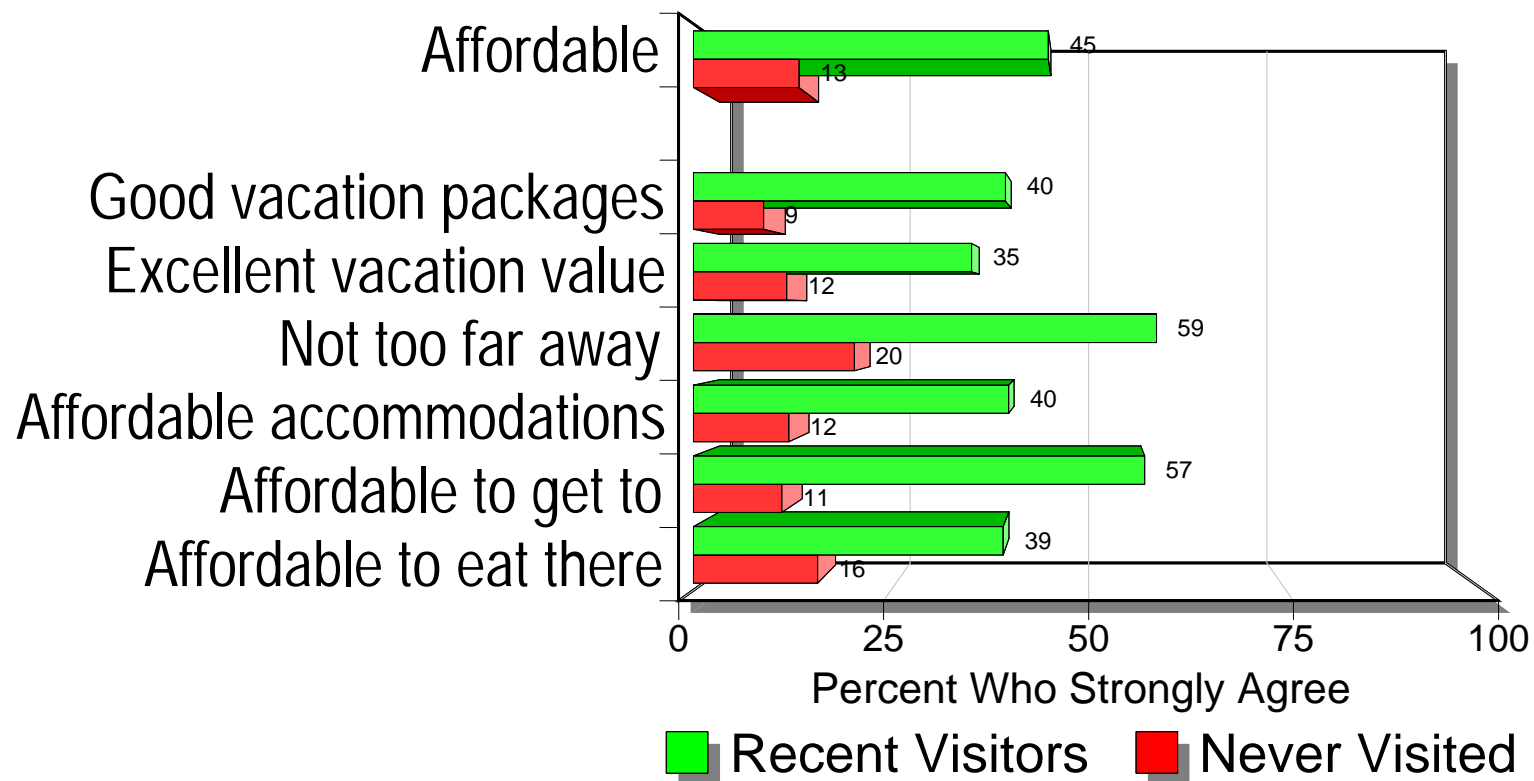
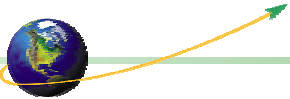
## Sports & Recreation (Cont'd)



# Worry Free

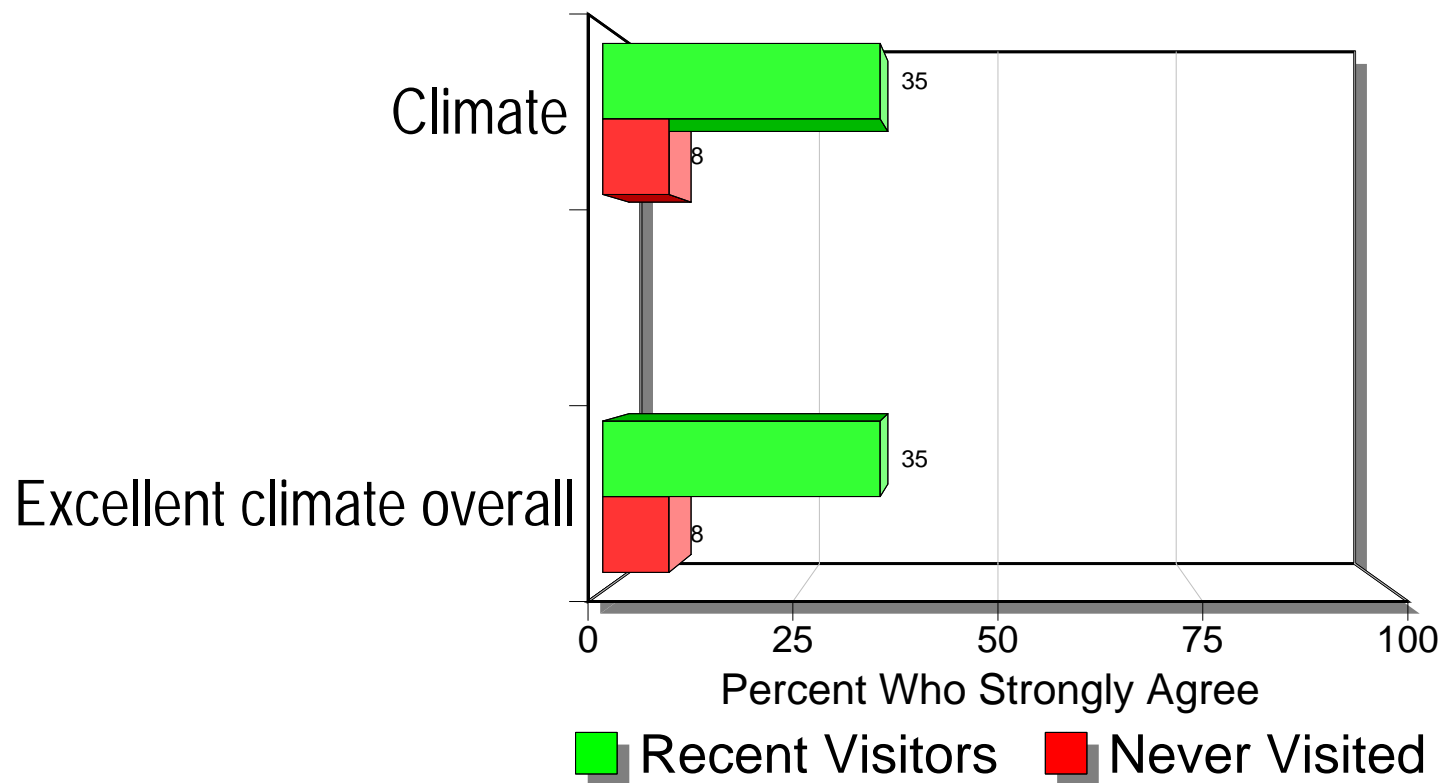
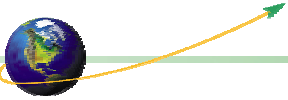


# Affordable



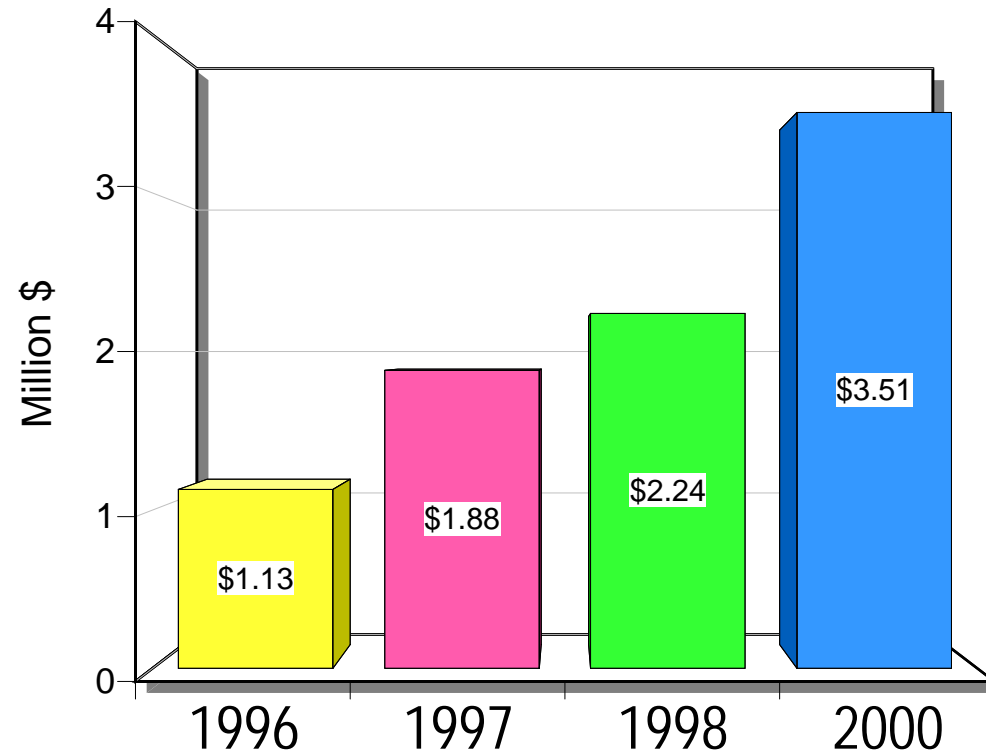
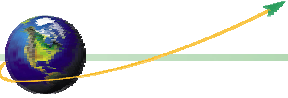


# Climate

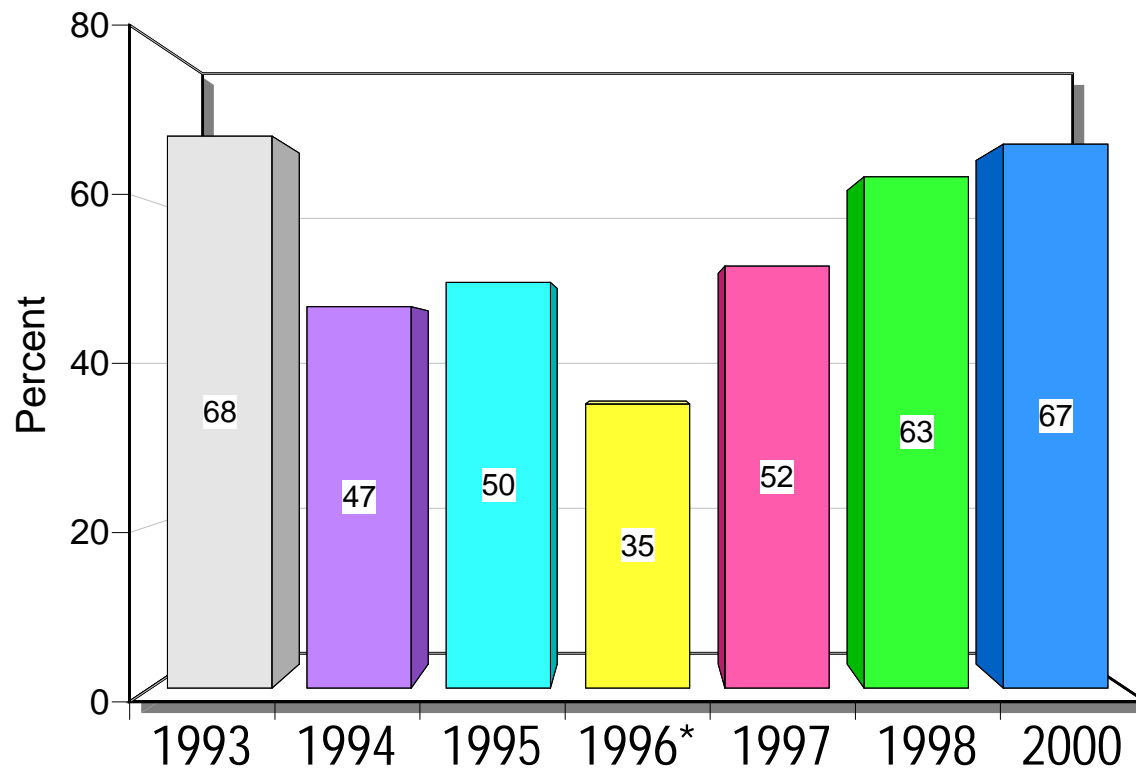
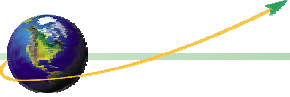


# Impact of the 2000 Advertising Campaign

# New Jersey Advertising Budget

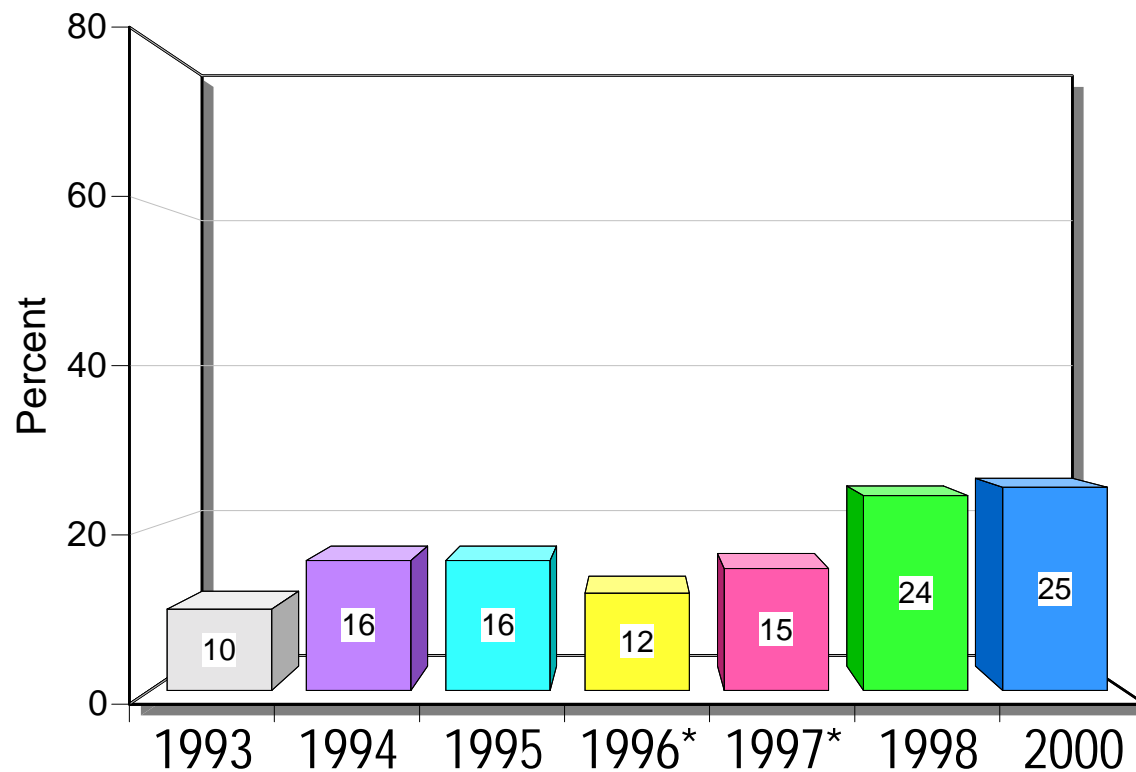


# A wareness of New Jersey's Advertising — Mid-Atlantic Markets



\* Print only

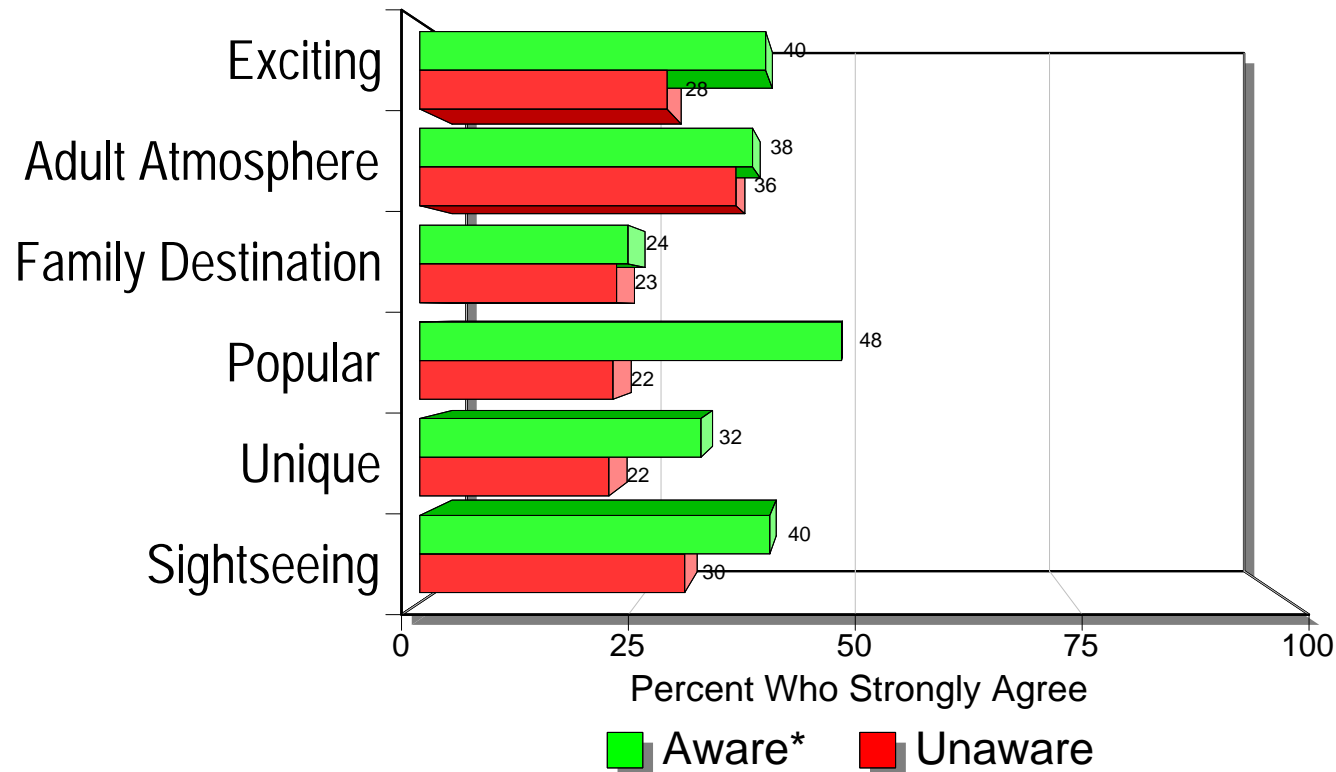
# Awareness of New Jersey's Advertising — Other U.S. Markets



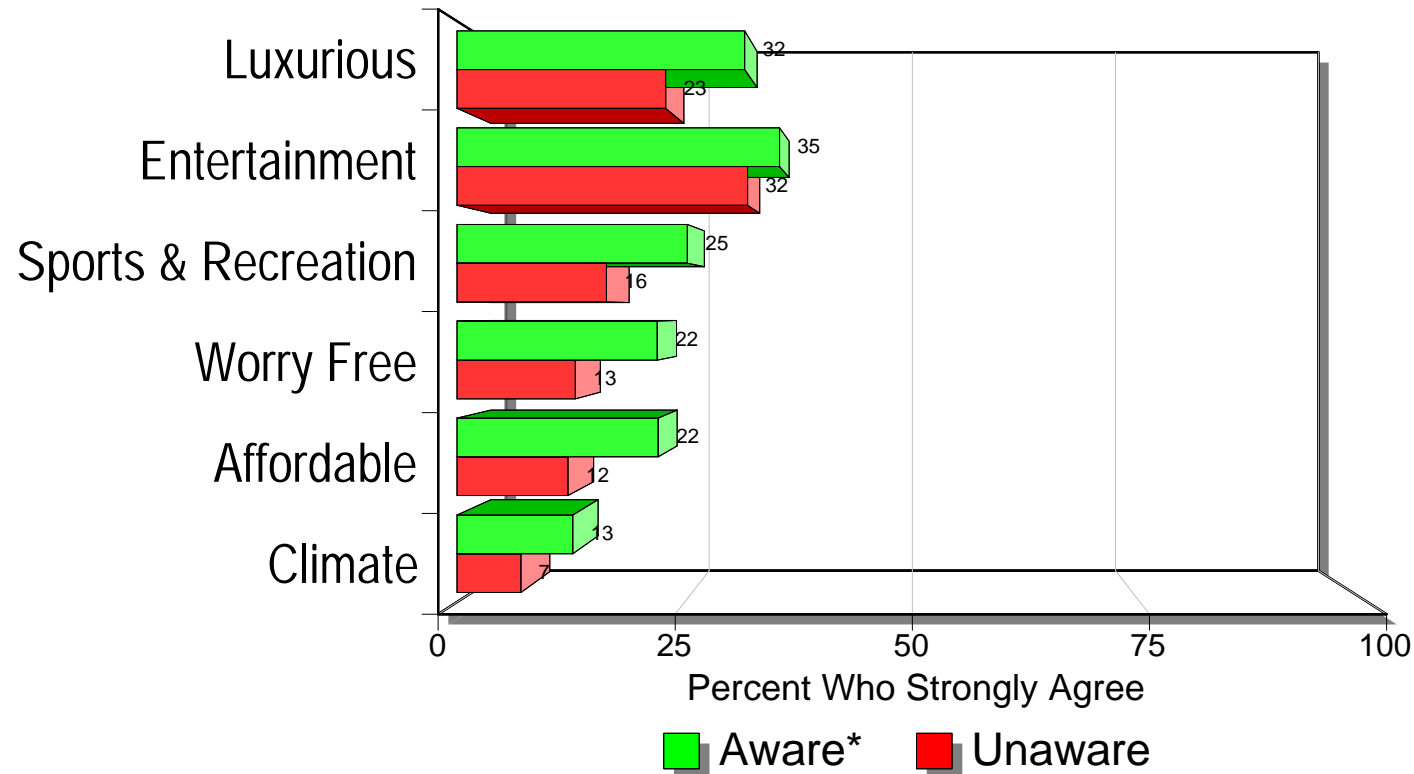
\* Print only

# Impact of 2000 Advertising on Short-of-Sales Measures

# Impact of 2000 Advertising on New Jersey's Image — U.S. Market

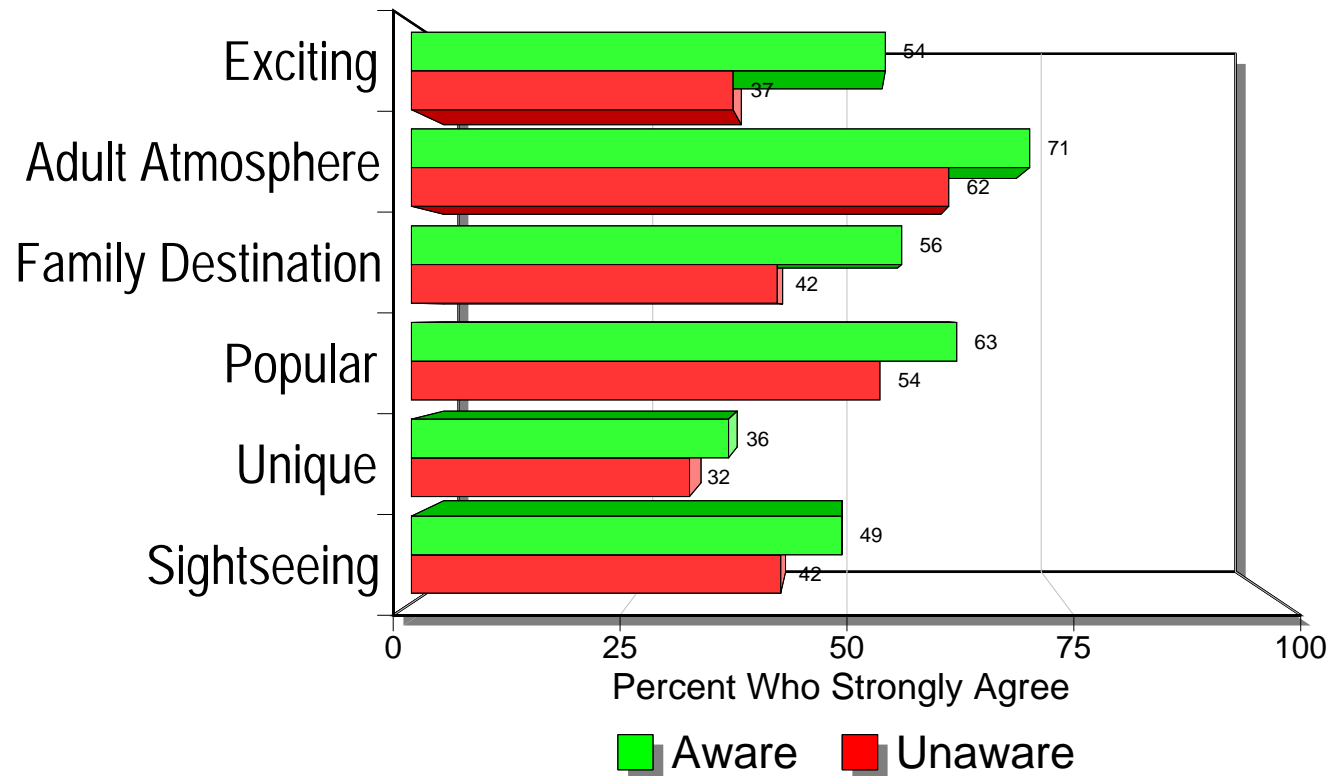


# Impact of 2000 Advertising on New Jersey's Image — U.S. Market (Cont'd)

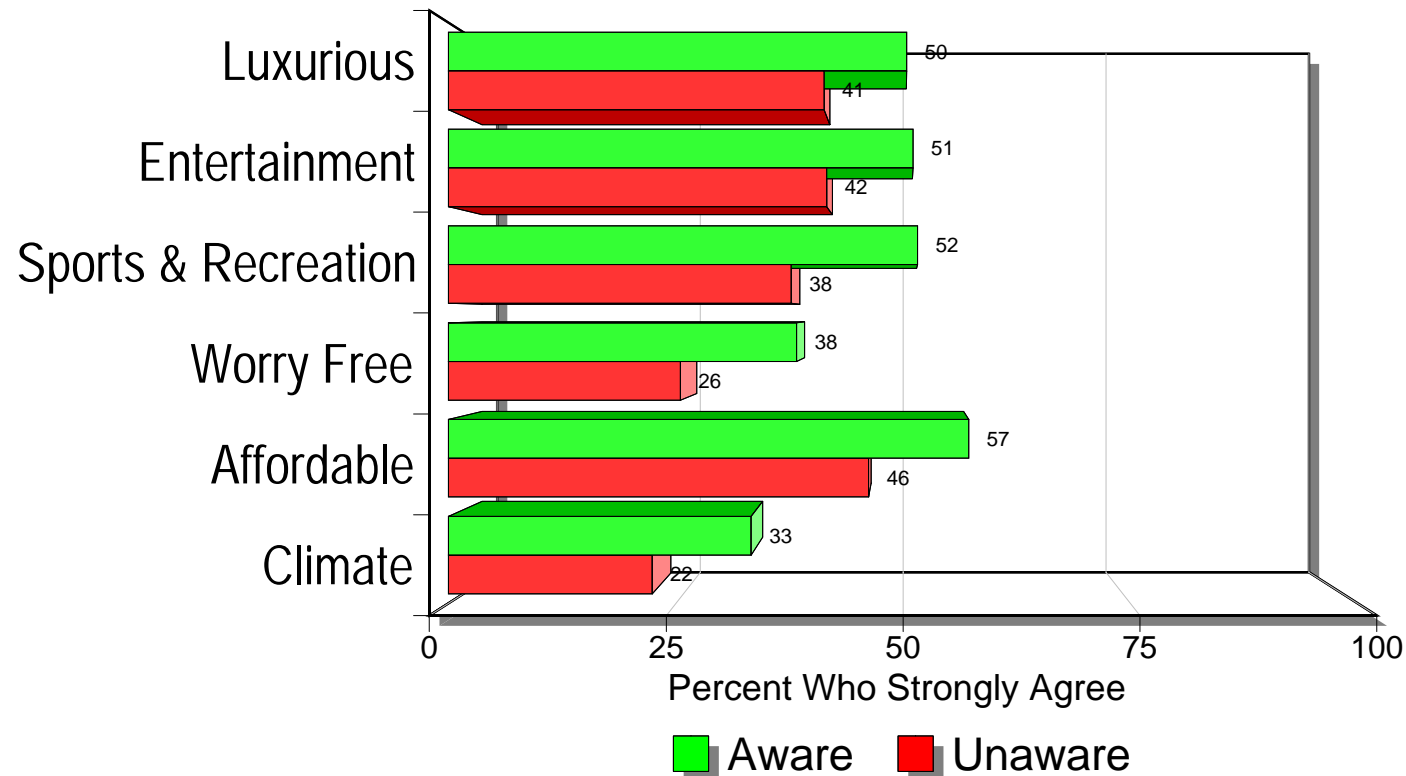




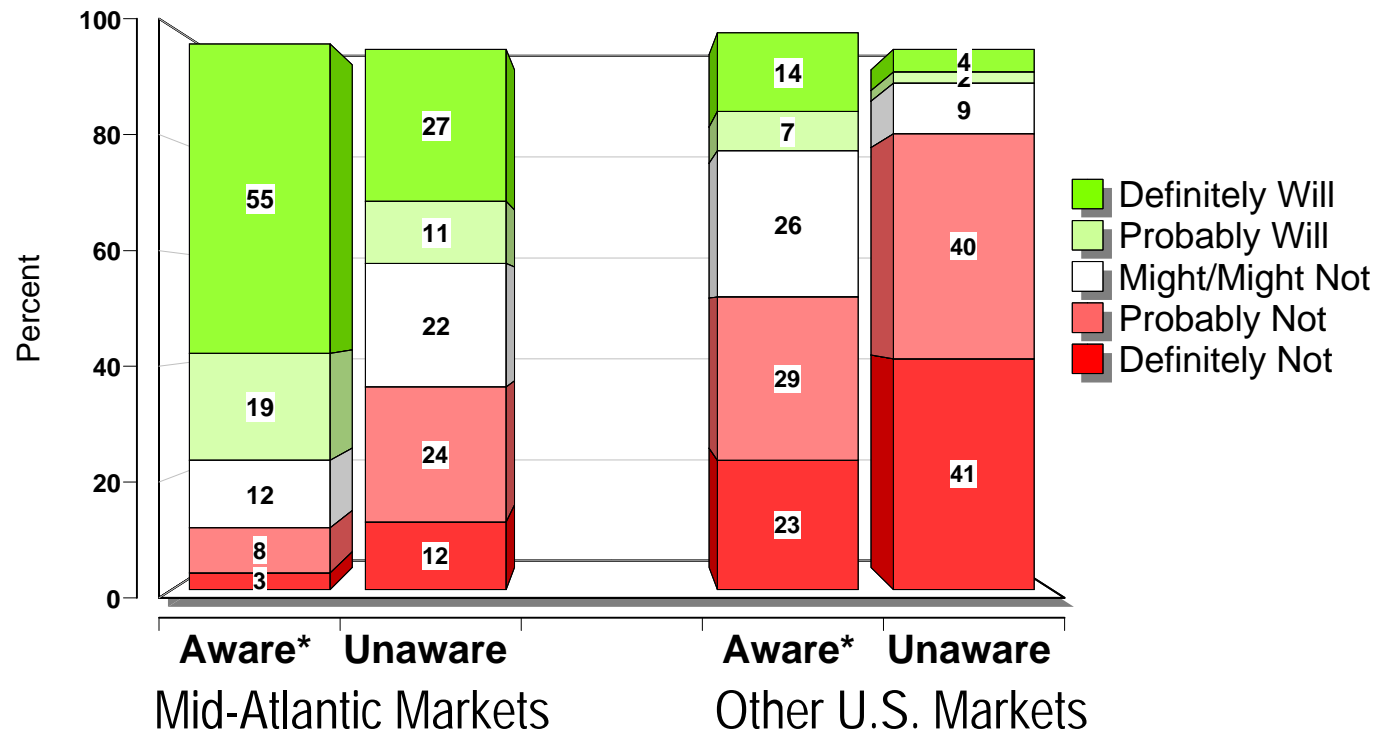
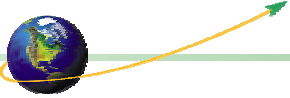
# Impact of 2000 Advertising on New Jersey's Image — Mid-Atlantic Market



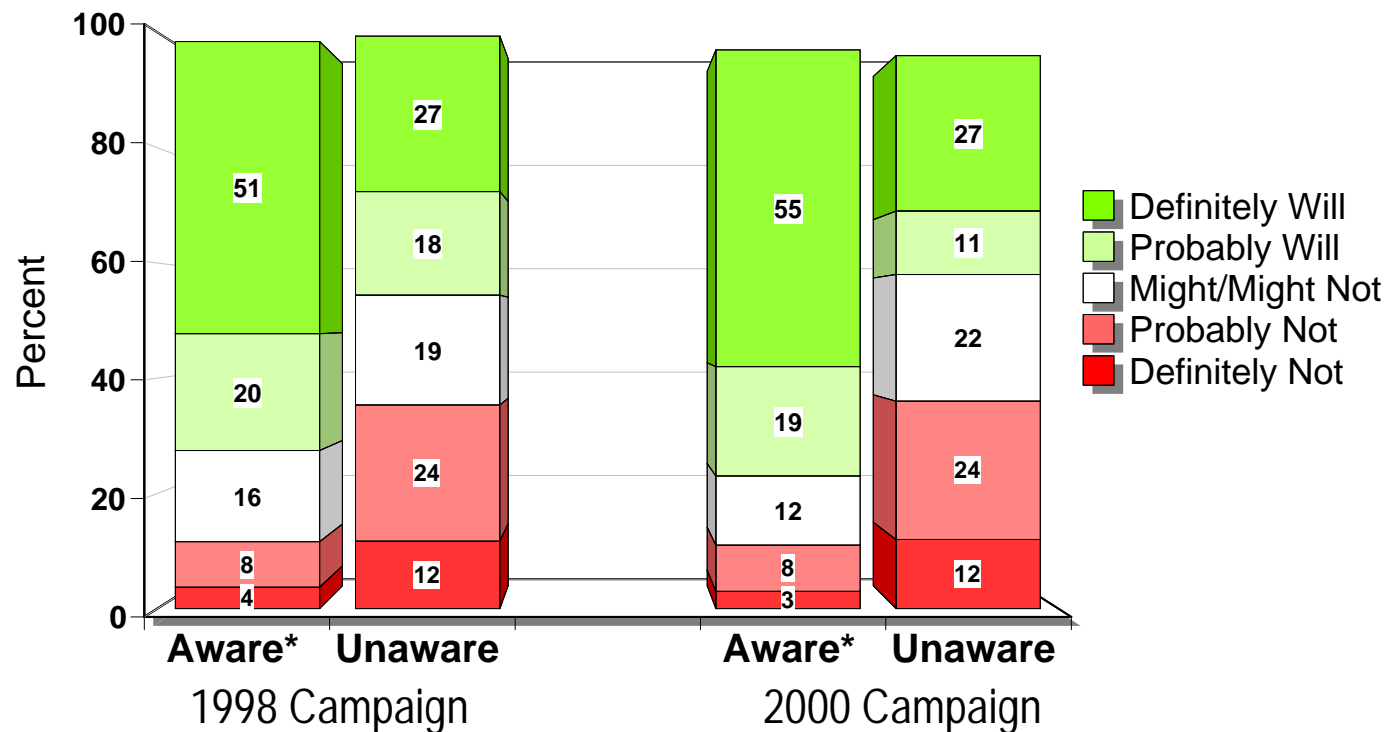
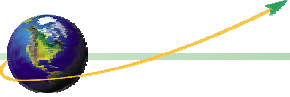
# Impact of 2000 Advertising on New Jersey's Image — Mid-Atlantic Market (Cont'd)



# Impact of the 2000 Advertising on Intentions to Visit in 2001

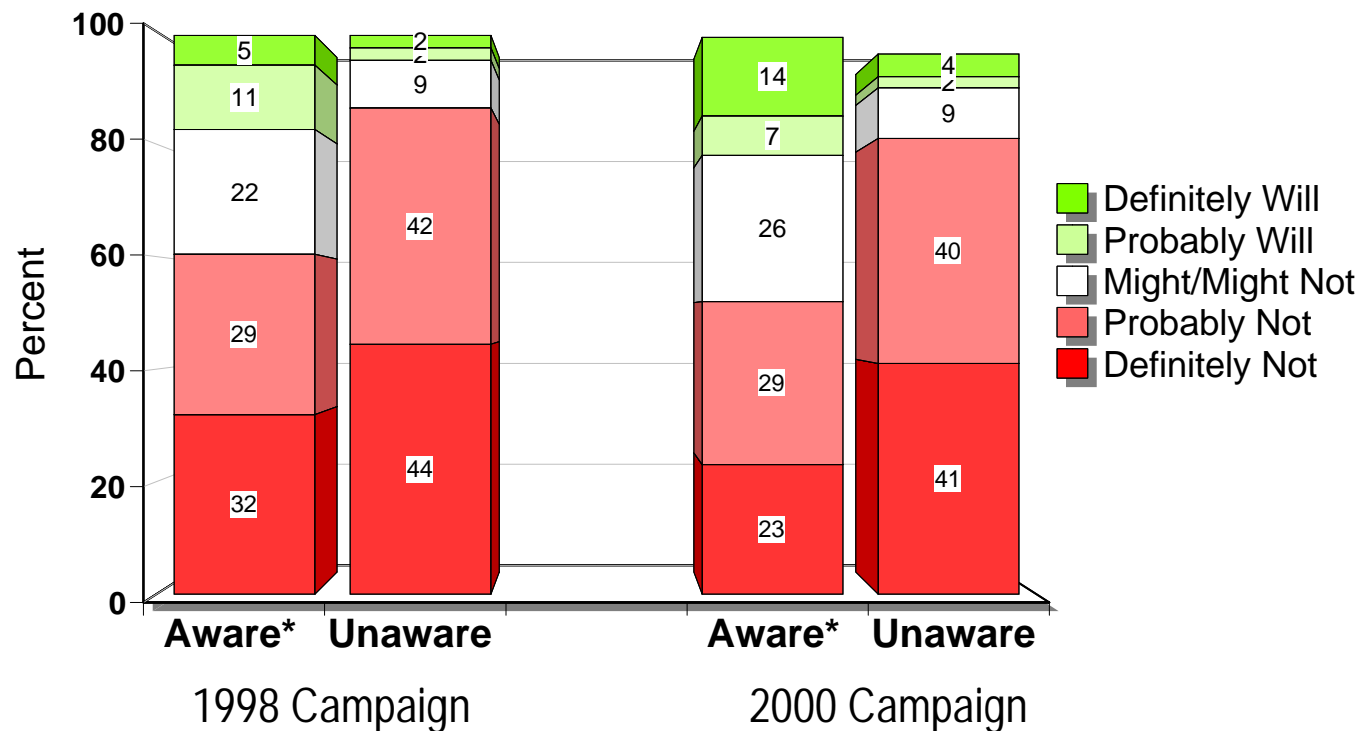
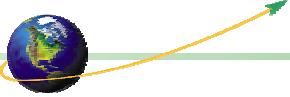


# Impact of Advertising in Mid-Atlantic Markets on Intentions to Visit



\*Saw at least 1 ad

# Impact of Advertising in Other U.S. Markets on Intentions to Visit

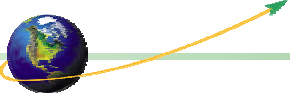


\*Saw at least 1 ad



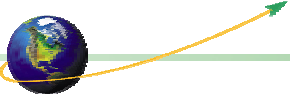
# Return on Advertising Investment – 2000 Campaign

# Trips Planned Due to 2000 Advertising Campaign



|              | <b><u>Regional<br/>Market</u></b> | <b><u>Other U.S.<br/>Markets</u></b> | <b><u>Total</u></b> |
|--------------|-----------------------------------|--------------------------------------|---------------------|
| During 2001  | 5,600,000                         | 5,200,000                            | <b>10,800,000</b>   |
| During 2002  | nil                               | 2,300,000                            | <b>2,300,000</b>    |
| <b>TOTAL</b> | <b>5,600,000</b>                  | <b>7,500,000</b>                     | <b>13,100,000</b>   |

# Return on Investment in Advertising

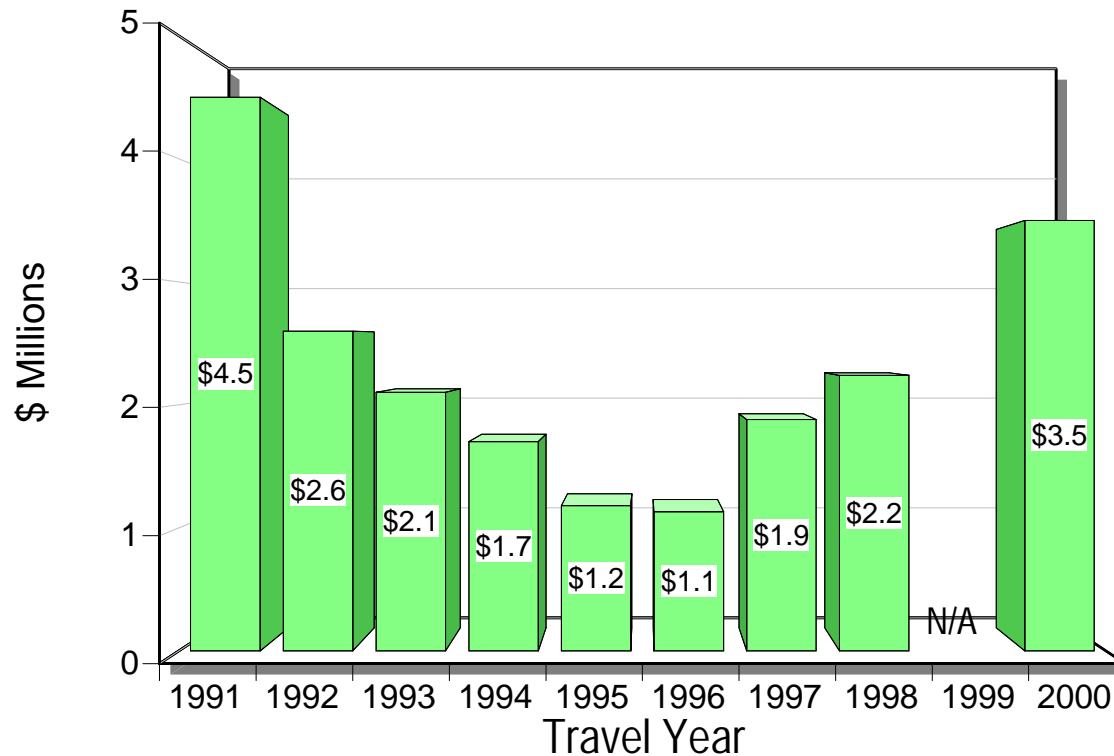
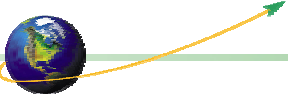


|   | 1999<br>Travel Year | 2001<br>Travel Year<br>(Projected) |
|---|---------------------|------------------------------------|
| Trips Influenced by Advertising (Millions)          | 4.4                 | 7.0                                |
| Expenditures Influenced by Advertising (\$Millions) | \$406               | \$734                              |
| Taxes Influenced by Advertising (\$Millions)        | \$52                | \$93                               |
| Media Budget (\$Millions)                           | \$2.2               | 3.5                                |
| Trips Per Dollar Invested                           | 1.96                | 1.99                               |
| Return in Travel Expenditures Per Dollar Invested   | \$181               | \$210                              |
| Return in State Taxes Per Dollar Invested           | \$23                | \$26                               |



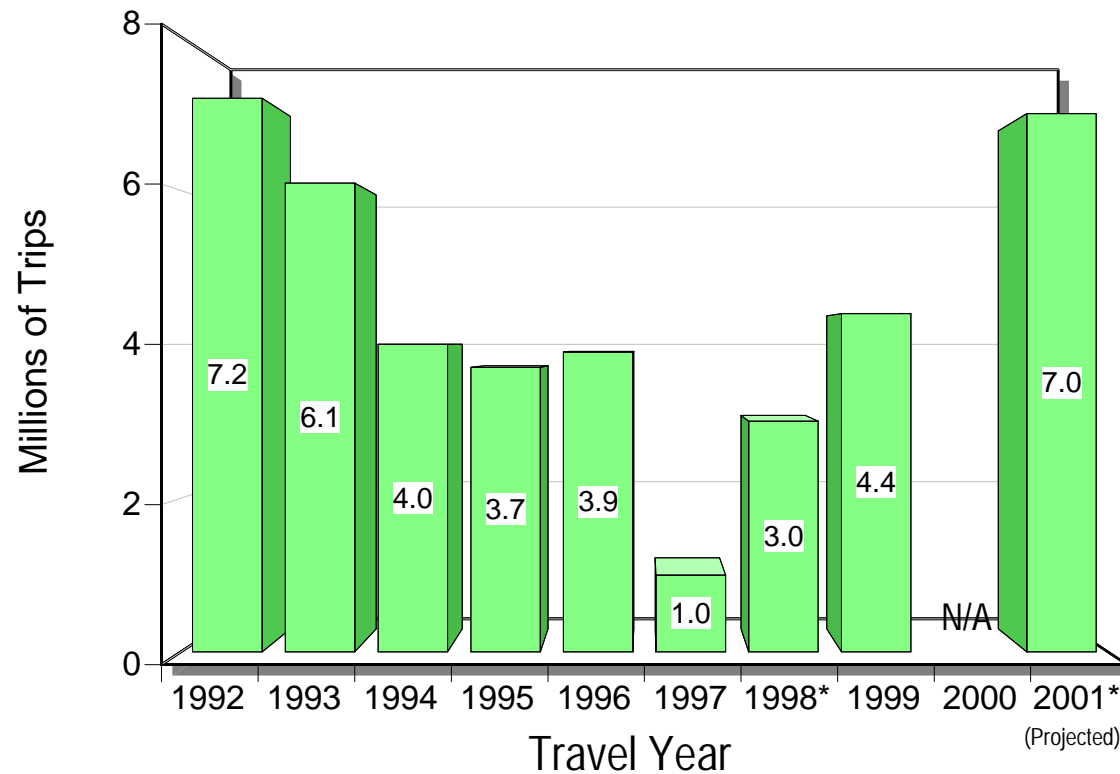
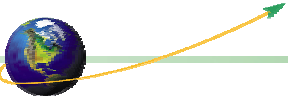
# Historical Trends in Advertising Impacts

# New Jersey's Advertising Budget



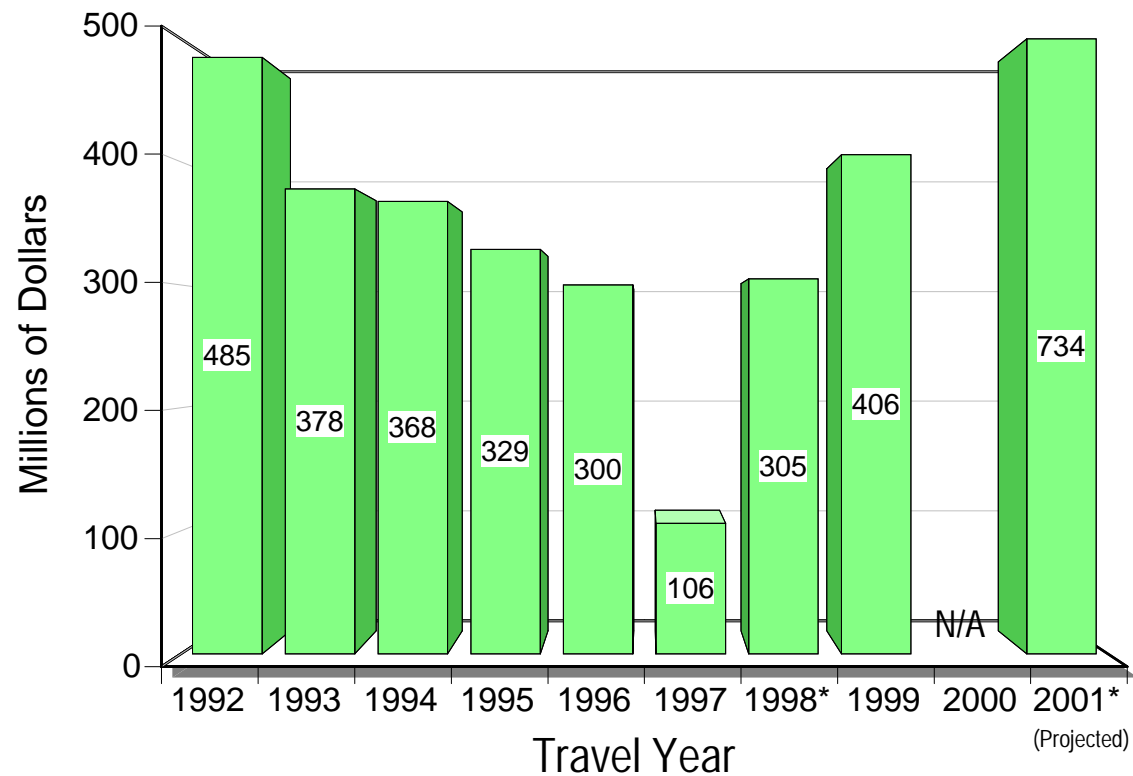
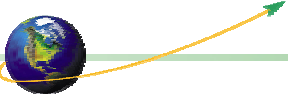
Note: The creative for the 92, 93, and 94 campaigns was similar; to account for likely carry-over impact, the budget figures reported for 93 and 94 are annualized figures based on a two year rolling average; actual budgets were \$1.6 million for 1993 and 1.75 million for 1994.

# Trips Generated by Advertising



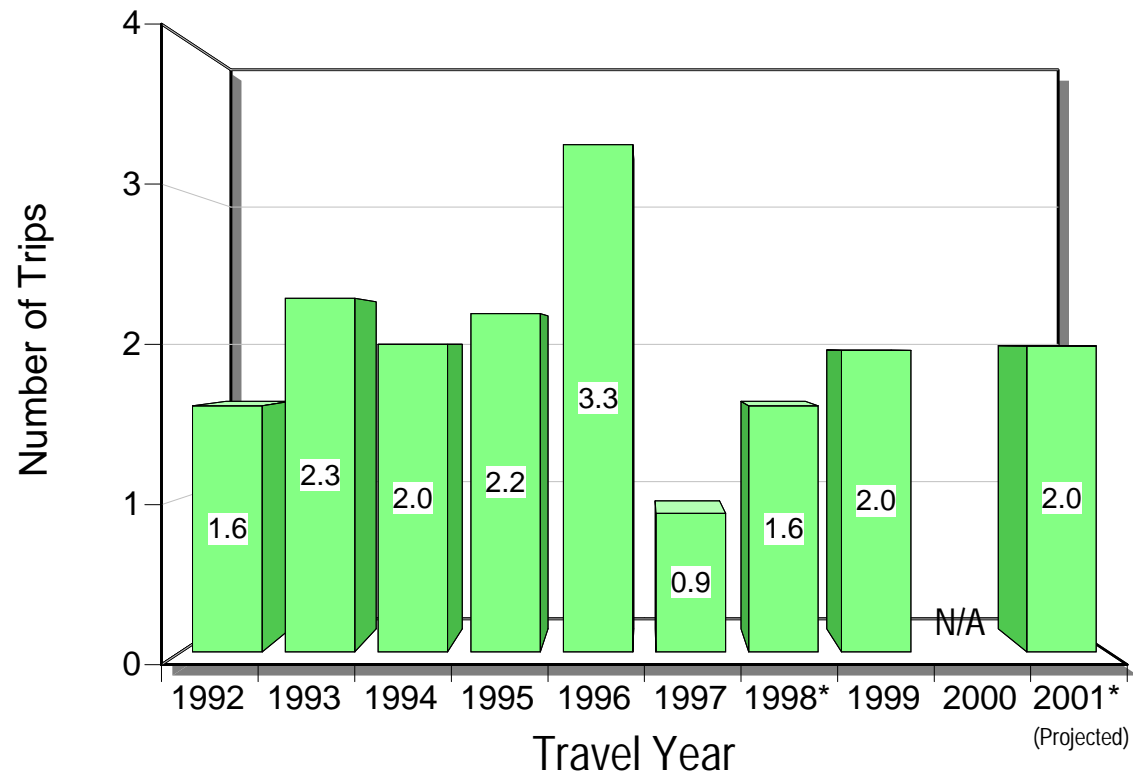
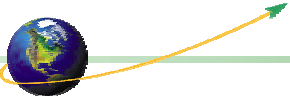
\* Estimated trips and expenditures based on historical conversion rate and expenditure data.

# Expenditures Generated by Advertising



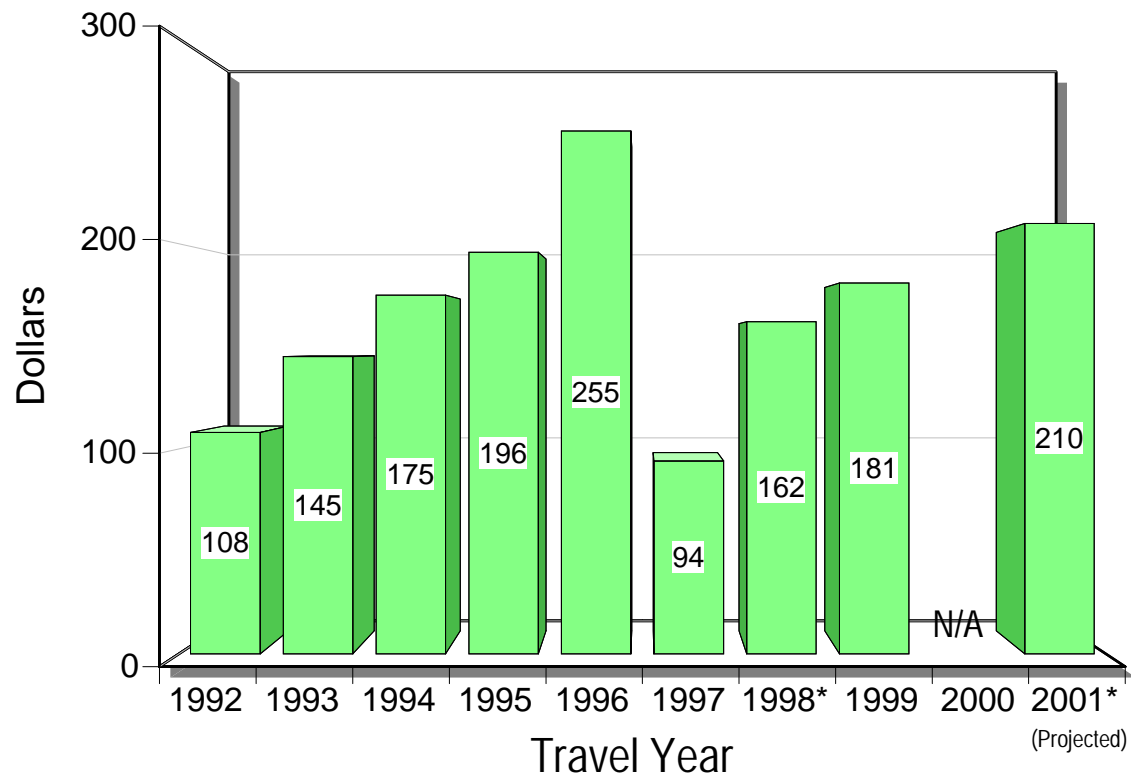
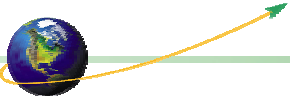
\* Estimated trips and expenditures based on historical conversion rate and expenditure data.

# Trips Per Dollar Invested in Advertising



\* Estimated trips and expenditures based on historical conversion rate and expenditure data.

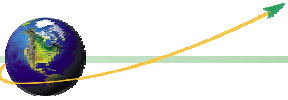
# Expenditures Per Dollar Invested in Advertising



\* Estimated trips and expenditures based on historical conversion rate and expenditure data.

# Appendix I: Research Overview

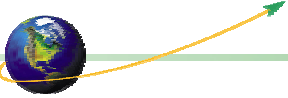
# Overview of The Research



- ◉ Consumer Research
  - ◉ Conducted as part of **TRAVEL USA**® Monitor, Longwoods syndicated travel research program
  - ◉ Respondents are members of a major US consumer mail panel that is balanced to be representative of U.S. households
  - ◉ Use of representative, rather than convenience, samples allows us to project results to all New Jersey travelers
  - ◉ Response rates range from 56% to over 70%, depending on the study
  - ◉ By participating in a syndicated research program, New Jersey obtains comprehensive data far more cost effectively than would otherwise be possible.

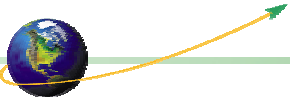


# Overview of The Research



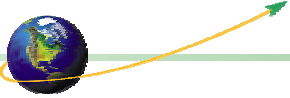
- ◉ Accommodations Inventory
  - ◉ *Conducted by Dr. James Rovelstad of Rovelstad & Associates and Longwoods International*
  - ◉ *Comprehensive survey of the entire New Jersey accommodations industry - including hotels, motels, resorts, campgrounds, and shore cottages.*

# Studies Conducted



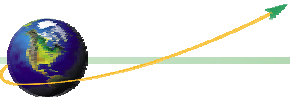
- ◉ **TRAVEL USA® Monitor:** quarterly survey mailed to 50,000 U.S. households; identifies the travel patterns of a randomly selected household member; identified over 2,000 travelers who had taken at least one overnight pleasure or business trip including New Jersey during 2000.
- ◉ **National Travel Monitor:** mailed to 2072 U.S. travelers to provide normative data on the U.S. travel market and trends.
- ◉ **New Jersey Visitor Monitor:** survey mailed to representative sample of 1570 New Jersey visitors identified through **TRAVEL USA® Monitor**; provides detailed data on the New Jersey overnight trip, including trip planning, itinerary and expenditures in New Jersey
- ◉ **New Jersey Day Trip Monitor:** special oversample of 1,200 households in New Jersey itself or within 150 miles of the New Jersey border to obtain a representative sample of New Jersey day trips.

# Studies Conducted



- ◉ **New Jersey Accommodations Survey:** complete inventory of all New Jersey accommodations establishments, including hotels, motels, resorts, and campgrounds, as well as agent-rented shore cottages in Atlantic, Cape May, Monmouth, and Ocean Counties.

# Image and Accountability Research



- ◉ The program includes annual monitoring of New Jersey's image, travelers awareness of the state's advertising and impacts of the advertising on travel to New Jersey.
- ◉ The Benchmark survey, mailed to 1,185 recent U.S. travelers, provides data on:
  - ◉ *top of mind awareness of New Jersey as a travel destination*
  - ◉ *detailed image (over 50 image attributes) for New Jersey vs. New York , Pennsylvania, Delaware*
  - ◉ *awareness of New Jersey advertising, based on recognition of samples of New Jersey ads, mailed with the survey*
- ◉ In 2000, conversion rates based on research from the previous several years were used to estimate the number of trips expected to be generated by New Jersey advertising in 2001.

## Appendix II: 2000 Surveys